ClubExpress™

MORE PASSION. LESS PAPERWORK.

In Partnership with

# Village Special Features Manual

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This user manual is intended for use by club and association members that are currently signed up to use the ClubExpress service, to help them maximize their use of and benefit from the ClubExpress platform. It is also intended for use by club and association officers who are evaluating the platform as a potential solution for their membership, web site and communications needs.

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# Chapter 1 – Introduction

Welcome to ClubExpress, the most powerful tool on the Internet for managing villages.

ClubExpress was designed to allow membership based organizations to move their administration entirely online. ClubExpress handles your organization's membership database, signups and renewals, committees, documents, discussions, event calendar and registration and financial management using the Internet.

Every organization that signs up for ClubExpress gets its own web site with content to promote the organization and its activities to visitors and potential members. Members log in to see members-only content, including a complete membership directory and profile. Other functions such as discussion forums are also reserved for members-only. When administrators log in, they have access to additional functions for managing the organization, including financial tracking, web site configuration, event management and other tasks.

For villages that are members of the Village-to-Village Network, ClubExpress includes the following special features:

- A Contact Log function to track every contact with members and non-members, whether by visit, phone, email, fax, letter or other. Contacts can be assigned a category, priority, status and responsible staff person, and can be managed screen or in reports. (Chapter 2)

- A Services function to track the services provided to members. Services are organized into categories and each service is provided through service providers who can be contractors, member volunteers or non-member volunteers. Services are also assigned a status and followup date, and the system includes a convenient scheduler screen, Daily ToDo list and multiple reports and data exports to track services. (Chapter 3)

- An Additional Contacts feature to track the additional contacts for members, including family, doctors, attorneys, care givers and others. (Chapter 4)

- Support for Hub-and-Spoke villages, including the ability to link members and service providers to a specific "spoke" (town, village, neighborhood, etc.) and to filter available service providers to those in the same general area as the member.

- An optional screen to allow members to find their own vetted contractors for information referral services.

- An optional wizard to allow non-member volunteers and contractors to register with the village. They are added to the database as *Not Vetted*

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and an email is sent to a designated coordinator. Once you vet them, they can start working with members.

- An optional module to all non-member volunteers to self-signup for volunteering opportunities. You can control which service categories and which service requests are displayed on this screen. Note that an additional one-time fee applies to this module.

Over time, other features will be added, in response to feedback received from members of the Village-to-Village Network.

## *THIS MANUAL*

This manual documents only the village-specific features in ClubExpress. It should be read in conjunction with the primary Administrator and User Manuals, which can be separately downloaded from your website.

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# Chapter 2 – Contact Log

## *INTRODUCTION*

This chapter describes the Contact Log function, which allows village administrators to manage every contact with members and non-members.

To access the Contact Log for members, go to **Control Panel – Member Manager**.

To access the Contact Log for non-members, go to **Control Panel – Non-Member Database**.

## *MEMBER CONTACT LOG*

When you search for a member in the Member Manager, you will see a screen similar to the following:

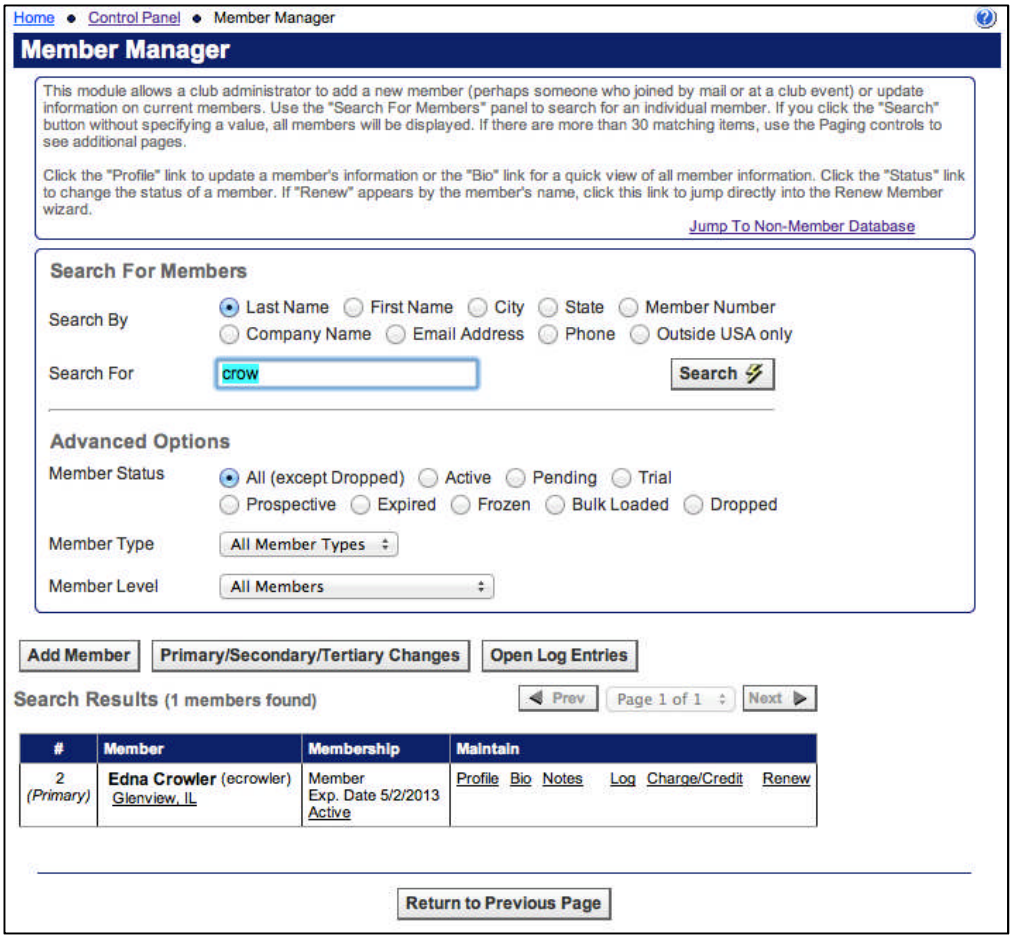
Home • Control Panel • Member Manager
Member Manager
This module allows a club administrator to add a new member (perhaps someone who joined by mail or at a club event) or update information on current members. Use the "Search For Members" panel to search for an individual member. If you click the "Search" button without specifying a value, all members will be displayed. If there are more than 30 matching items, use the Paging controls to see additional pages.
Click the "Profile" link to update a member's information or the "Bio" link for a quick view of all member information. Click the "Status" link to change the status of a member. If "Renew" appears by the member's name, click this link to jump directly into the Renew Member wizard.
Jump To Non-Member Database
Search For Members
Search By
Last Name
First Name
City
State
Member Number
Company Name
Email Address
Phone
Outside USA only
Search For
crow
Search
Advanced Options
Member Status
All (except Dropped)
Active
Pending
Trial
Prospective
Expired
Frozen
Bulk Loaded
Dropped
Member Type
All Member Types
Member Level
All Members
Add Member
Primary/Secondary/Tertiary Changes
Open Log Entries
Search Results (1 members found)
Prev
Page 1 of 1
Next
# Member Membership Maintain
2 (Primary)
Edna Crowler (ecrowler)
Glenview, IL
Member
Exp. Date 5/2/2013
Active
Profile Bio Notes Log Charge/Credit Renew
Return to Previous Page

*Figure 2.1 – Member Manager*

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Beside each member in the Maintain column, one of the options is **Log**. It allows you to view and maintain log entries for each member. When you select this option you will see a screen similar to the following:

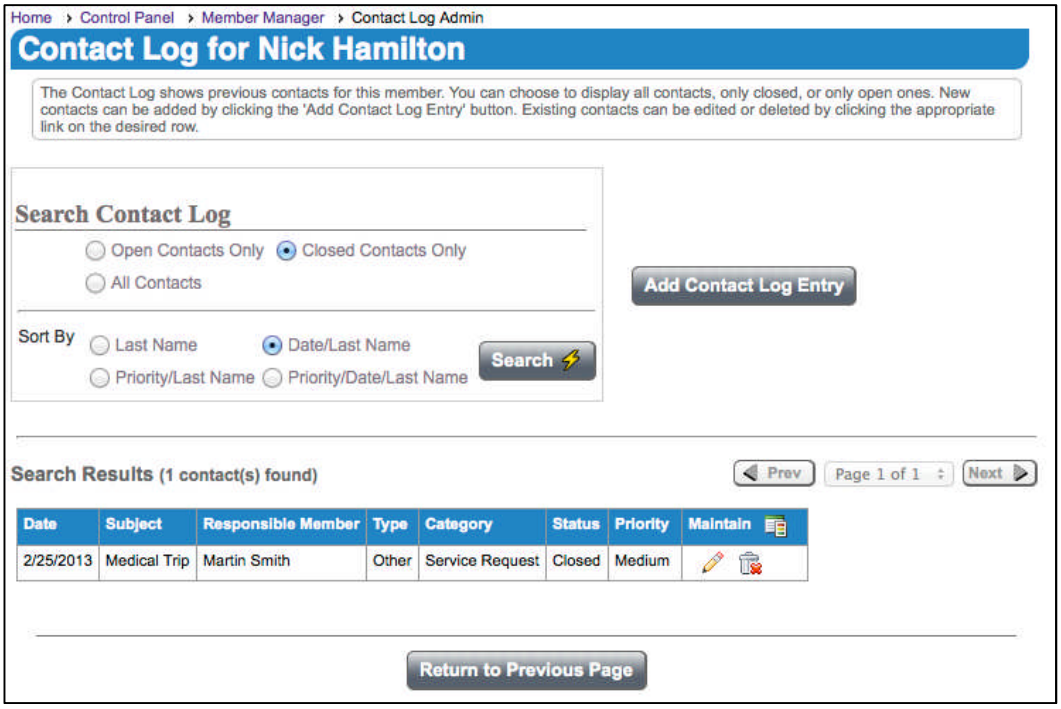


*Figure 2.2 – Member Contact Log*

Use the Search options at the top to filter the list by Open Contacts Only, Closed Contacts Only or All Contacts. You can also control the sort order from among four options. Click the **Search** button to refresh the list.

For each contact, the screen shows the date, title, responsible staffer, contact type, category, status, and priority. Responsible staffers and categories can be configured for each village (see below for more information.) The system will show 30 contacts on each page; if a member has more than 30 contacts, the navigation buttons allow you to move from page to page. Click the **Edit** (pencil) icon to modify an existing contact. Click the **Delete** (trash bin) icon to remove a contact entry.

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## Add Contact Log Entry

Click the **Add Contact** button to add a contact entry. You will see the following screen:

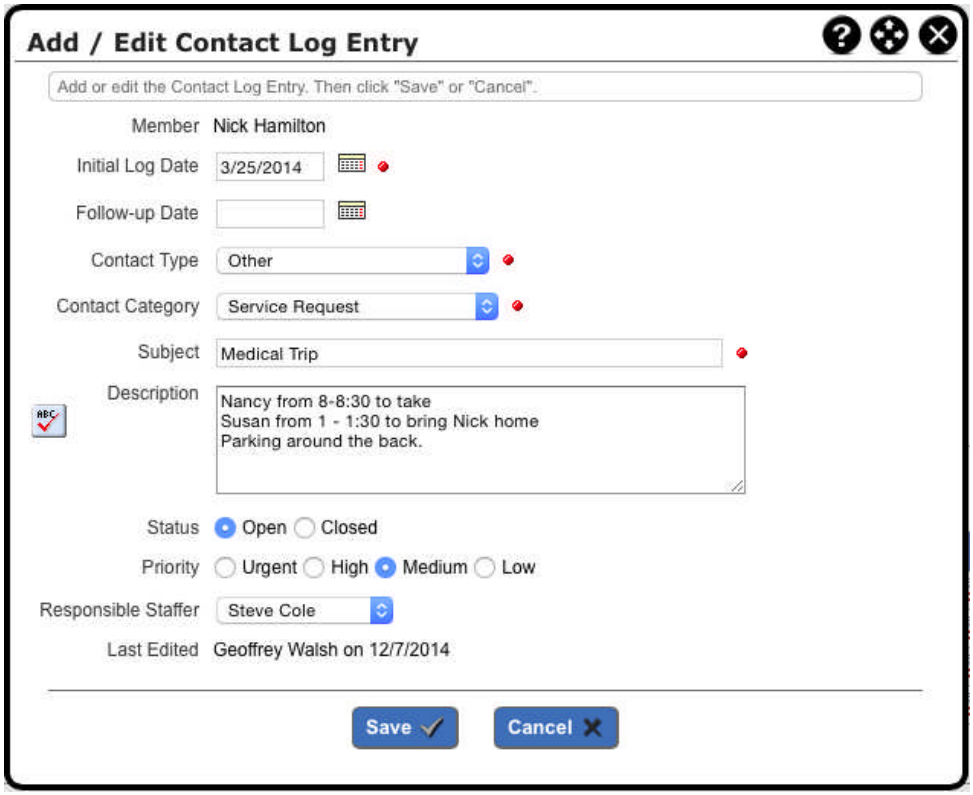


*Figure 2.3 – Add Contact*

Because you created this contact from a member's Profile, the member name is already filled in. The following additional fields are available:

- Initial contact log date (required).
- Followup date. When you enter a date here, the system will create an open followup entry in the contact log. It is coded as "CL F/U" to indicate that it came from the Contact Log (versus a service request followup, which is coded as "SR F/U" to indicate that it came from the Service Request function.) If you leave it blank a followup entry is not created.
- Contact Type (required). Select an option from the drop-down list. All basic contact types should be available but let ClubExpress know if you need an additional type added.
- Contact Category (required), Used for reports. The system includes a number of built-in categories but you can add your own categories (see below for more information.)

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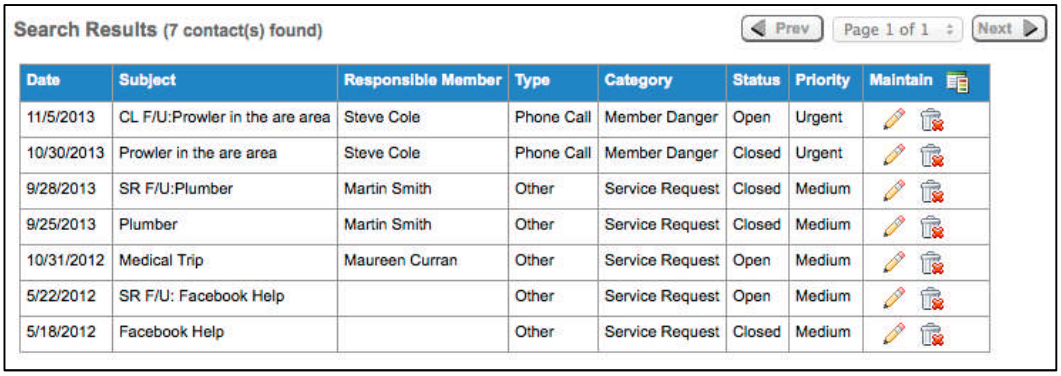
- Subject (required) and Description. Click the Spellcheck button to check your spelling in the Description field.
- Status – either Open or Closed.
- Priority – Urgent, High, Medium or Low.
- Responsible Staffer. Use this option to track who is responsible for handling this issue or for following up with the member.

Click **Save** to save the new contact log entry and return to the main listing, or **Cancel** to return without saving. When you click save using the above example, two contact log entries are created, one for the initial log entry, which is flagged based on the Status; and another for the followup entry (flagged as "CL F/U" for "Contact Log Follow Up") which is always Open.


Search Results (7 contact(s) found) Prev Page 1 of 1 Next

| Date | Subject | Responsible Member | Type | Category | Status | Priority | Maintain |
|---|---|---|---|---|---|---|---|
| 11/5/2013 | CL F/U:Prowler in the are area | Steve Cole | Phone Call | Member Danger | Open | Urgent | |
| 10/30/2013 | Prowler in the are area | Steve Cole | Phone Call | Member Danger | Closed | Urgent | |
| 9/28/2013 | SR F/U:Plumber | Martin Smith | Other | Service Request | Closed | Medium | |
| 9/25/2013 | Plumber | Martin Smith | Other | Service Request | Closed | Medium | |
| 10/31/2012 | Medical Trip | Maureen Curran | Other | Service Request | Open | Medium | |
| 5/22/2012 | SR F/U: Facebook Help | | Other | Service Request | Open | Medium | |
| 5/18/2012 | Facebook Help | | Other | Service Request | Closed | Medium | |

*Figure 2.4 – Contact Log after creating the new entry above*

When you click the **Edit** link, the same screen is shown, with the additional information of when the contact was last edited.

Click **Return to Previous Page** to return to the Member Manager.

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## OPEN CONTACT LOG ENTRIES

The Member Manager also has an **Open Log Entries** button. Clicking this button displays a similar grid screen showing all open contact log entries, together with some additional functions. You will see a screen similar to the following:

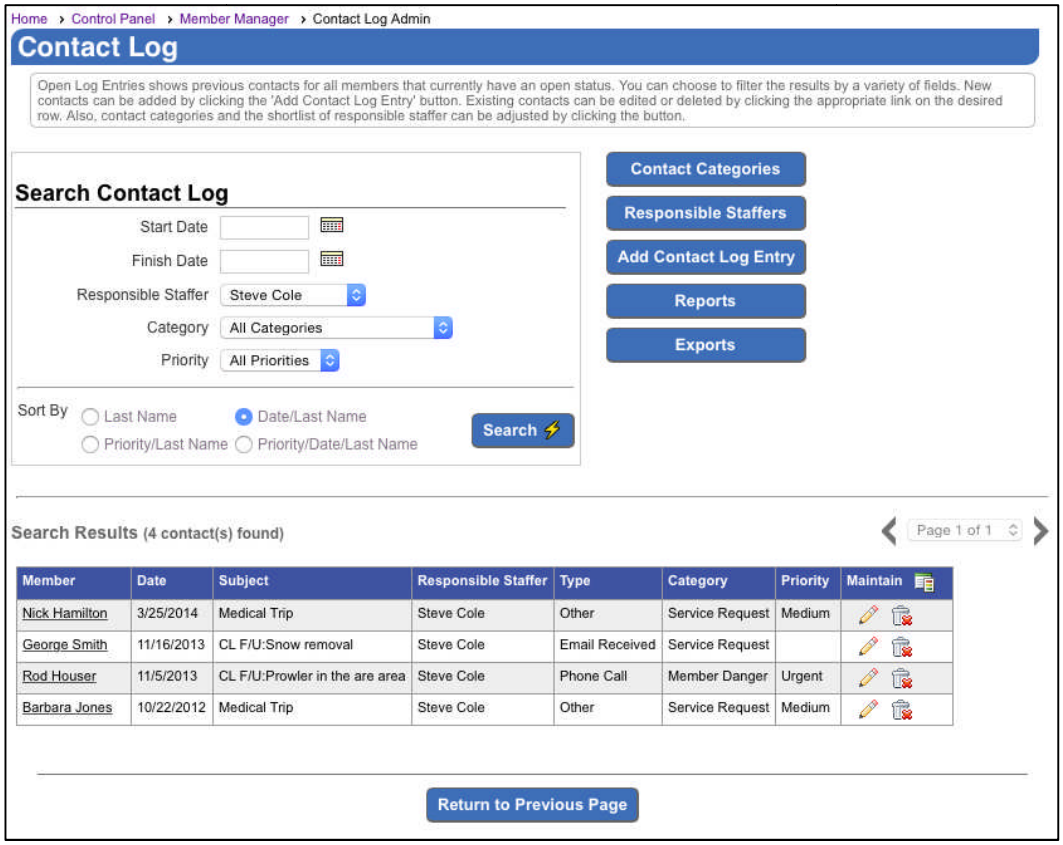


*Figure 2.5 – Open Log Entries*

The search panel has some additional options to help narrow the list, but otherwise it behaves the same way as the search panel for an individual member. The grid has the same columns with an addition in column 1: the member for whom the contact log entry was created.

Note that only open contact log entries are shown. In the above example, for Edna Crowler and volunteering, the original log entry is not shown because it has been closed; only the open followup entry is shown.

If you click the **Edit** link for a “CL F/U” entry, the Contact Log Add/Edit screen is displayed.

If you click the **Edit** link for a “SR F/U” entry, the Service Request Add/Edit screen is displayed. You will most often use this option after the service date to get ratings and comments from the member and service provider(s).

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## Contact Categories

Click **Contact Categories** to modify your contact categories. You will see a list similar to the following:

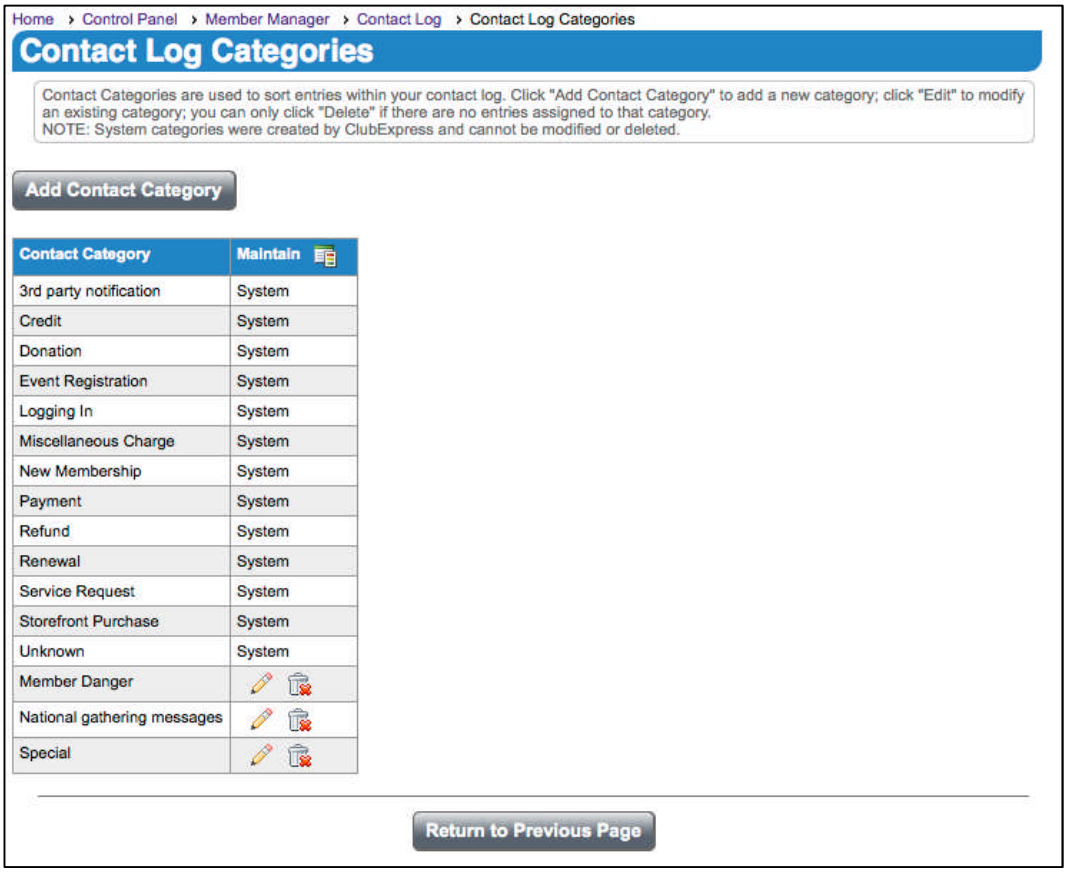


*Figure 2.6 – Contact Categories*

The system includes a number of built-in categories that cannot be changed. You can also add your own categories by clicking the **Add Contact Category** button. It will display a simple popup to enter and save a new category. These categories can be edited and deleted if they have not been used.

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## Responsible Staffers

Click **Responsible Staffers** to define the list of members (usually staff people and volunteers) who are responsible for following up on open log entries. (In the ClubExpress model, everyone who works at a village and who needs some level of admin access to member data must be in the membership database, perhaps with a special member type—for example, “Staff”.) You will see a list similar to the following:

Home › Control Panel › Member Manager › Contact Log › Responsible Staffers
Responsible Staffers
Click 'Add Responsible Staffer' to select and add an existing staff member as a person responsible for contact logs entries. Click 'Delete' to remove a person (this will not delete the staff member, but merely remove them from the list of responsible persons.
Add Responsible Staffer
Name
Maintain
Steve Cole
Maureen Curran
Nora Ellsworth
Pete Harris
Barbara Jones
Martin Smith

*Figure 2.7 – Responsible Staffers*

Click the **Add Responsible Staffer** button to display the standard ClubExpress member selector. You only need to enter the first few letters of the last name and press *[Enter]* to see a list of matching members. Select one and click **Select** to add that staff member, or click **Cancel** to close without making a selection.

Responsible staffers are also used when creating and managing service requests, office time requests, and service provider vettings. This same screen is available in the Service Requests function.

## Add Contact Log Entry

Click the **Add Contact Log Entry** button to add a new contact log entry. Because you displayed this dialog from the Open Log Entries screen, the member name is not pre-filled and you need to select it. Click **Select Member** to display the same member selector described above.

Otherwise, this dialog behaves the same way as already described.

## Reports

Select this option to display a standard ClubExpress Report wizard. The system lists a number of reports on open log entries. Select a report and click **Next**. Then select a report title and output format and click **Run Report** to display your report.

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### Exports

Click this button to export Closed Contact Log Entries within a specified date range. You will see the following screen:

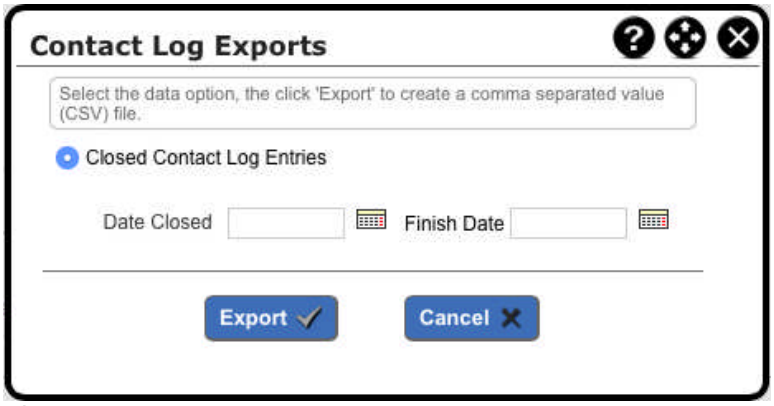
Contact Log Exports
Select the data option, the click 'Export' to create a comma separated value (CSV) file.
Closed Contact Log Entries
Date Closed
Finish Date
Export
Cancel

*Figure 2.8 – Contact Log Export*

One export is currently available. Specify the date range and click **Export** to generate a CSV file in your browser's download folder. Click **Cancel** to close this dialog without exporting.

## *NON-MEMBER CONTACT LOG*

To view contact log entries for non-members, go to **Control Panel – Non-Member Database.** Use the Search options to limit which non-members are shown, or just click the **Search** button to display the whole list.

To display the Contact Log screen for a non-member, click the **Maintain** link and select **Log** from the popup menu (it's near the bottom.) The resulting screen is identical to the Log screen for a member.

### Open Contact Log Entries

The non-member database screen also has an **Open Log Entries** button. Clicking it displays the same screen described above for members but this time showing open log entries for non-members. All other buttons and functions are the same.

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# Chapter 3 – Member Services

## *INTRODUCTION*

A fundamental purpose of villages is to help seniors live independently in their homes by providing them with services, including transportation, financial advice, computer help, referrals to trusted contractors, and other types of support. For villages, ClubExpress includes a powerful Services function that allows you to track services by category, the providers and the services that they provide, service requests and followup actions.

Options specific to “Hub-and-Spoke” villages are discussed in Chapter 4.

## *SERVICE SCHEDULER*

To access the Services function, go to **Control Panel – Village Services**. You will see a screen similar to the following:

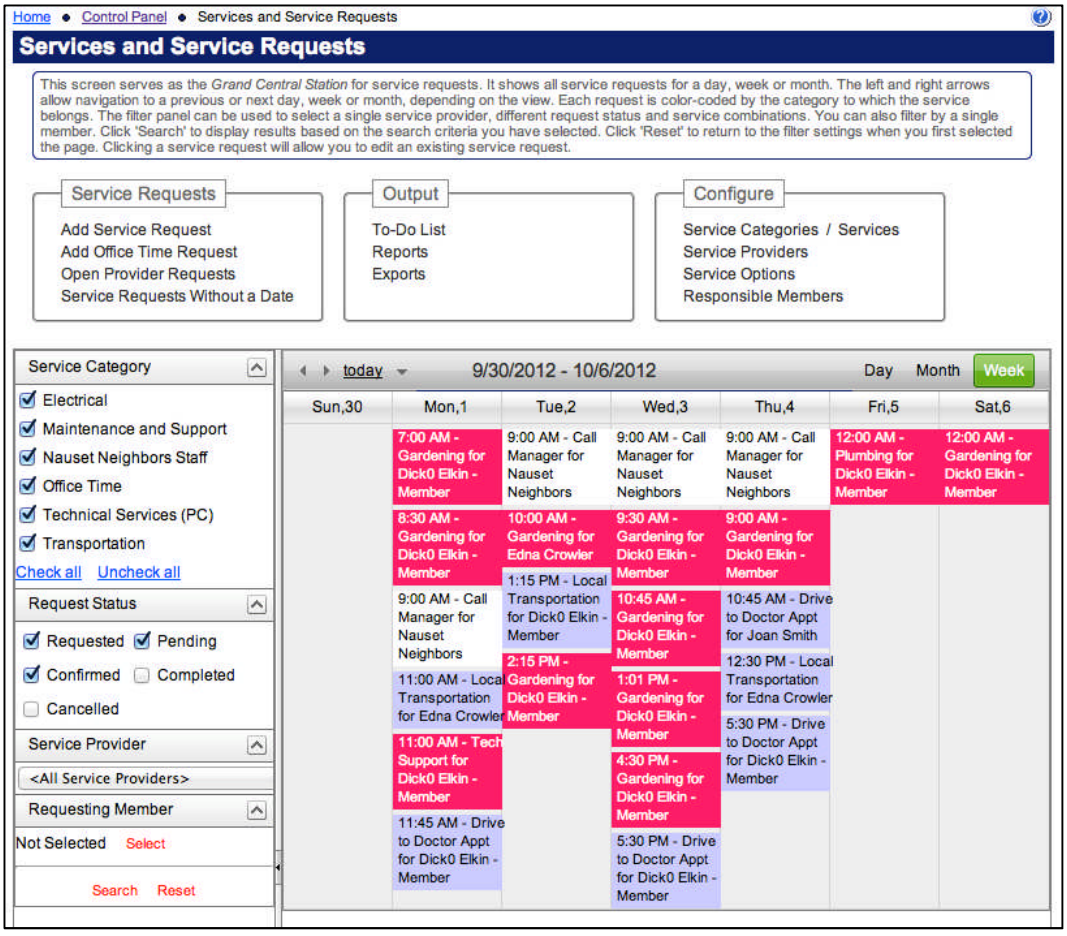
Home • Control Panel • Services and Service Requests
Services and Service Requests
This screen serves as the Grand Central Station for service requests. It shows all service requests for a day, week or month. The left and right arrows allow navigation to a previous or next day, week or month, depending on the view. Each request is color-coded by the category to which the service belongs. The filter panel can be used to select a single service provider, different request status and service combinations. You can also filter by a single member. Click 'Search' to display results based on the search criteria you have selected. Click 'Reset' to return to the filter settings when you first selected the page. Clicking a service request will allow you to edit an existing service request.
Service Requests
Add Service Request
Add Office Time Request
Open Provider Requests
Service Requests Without a Date
Output
To-Do List
Reports
Exports
Configure
Service Categories / Services
Service Providers
Service Options
Responsible Members
Service Category
Electrical
Maintenance and Support
Nauset Neighbors Staff
Office Time
Technical Services (PC)
Transportation
Check all Uncheck all
Request Status
Requested Pending
Confirmed Completed
Cancelled
Service Provider
<All Service Providers>
Requesting Member
Not Selected Select
Search Reset
today
9/30/2012 - 10/6/2012
Day Month Week
Sun,30 Mon,1 Tue,2 Wed,3 Thu,4 Fri,5 Sat,6
7:00 AM - Gardening for Dick0 Elkin - Member
9:00 AM - Call Manager for Nauset Neighbors
9:00 AM - Call Manager for Nauset Neighbors
9:00 AM - Call Manager for Nauset Neighbors
12:00 AM - Plumbing for Dick0 Elkin - Member
12:00 AM - Gardening for Dick0 Elkin - Member
8:30 AM - Gardening for Dick0 Elkin - Member
10:00 AM - Gardening for Edna Crowler
9:30 AM - Gardening for Dick0 Elkin - Member
9:00 AM - Gardening for Dick0 Elkin - Member
9:00 AM - Call Manager for Nauset Neighbors
1:15 PM - Local Transportation for Dick0 Elkin - Member
10:45 AM - Gardening for Dick0 Elkin - Member
10:45 AM - Drive to Doctor Appt for Joan Smith
11:00 AM - Local Transportation for Edna Crowler
2:15 PM - Gardening for Dick0 Elkin - Member
1:01 PM - Gardening for Dick0 Elkin - Member
12:30 PM - Local Transportation for Edna Crowler
11:00 AM - Tech Support for Dick0 Elkin - Member
4:30 PM - Gardening for Dick0 Elkin - Member
5:30 PM - Drive to Doctor Appt for Dick0 Elkin - Member
11:45 AM - Drive to Doctor Appt for Dick0 Elkin - Member
5:30 PM - Drive to Doctor Appt for Dick0 Elkin - Member

*Figure 3.1 – Service Scheduler*

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Options are listed across the top and described in detail below. Below these options is a calendar object that shows the services scheduled by day, week or month. Use the settings in the top right corner of the calendar to change the view. Use the arrows in the top left corner to move forward or backward or to jump to Today. Click the down arrow to display a popup calendar to select a specific day.

Services are color coded by category. If a service provider has been selected, that person's name will be shown as part of the entry. If you see ellipses (...) after the name, it means that more than one service provider has been selected. Click a service to edit the properties of that service. If you hover your mouse over the service a red "X" icon will appear, allowing you to delete the service; you will be asked to confirm this action.

Within a day, services without an assigned time will be shown first, followed by services in order of their starting time. Services without an assigned date cannot be shown on the grid; they are shown on a separate screen, described below.

## Filtering the Services Shown

Selecting different options in the left panel, then clicking the Search link, will filter the services shown in the calendar. You can also click the Reset link to remove filtering criteria and reset to the default configuration:

- All categories
- Services with a Requested, Pending or Confirmed status only
- All service providers
- All members

Click **Service Category** to check or uncheck which service categories should be shown. Click **Request Status** to check or uncheck which status values should be included in the search. Click **Service Provider** then click the drop-down to show only services being provided by one service provider. Click **Requesting Member** then click the Select link to show only services being provided to one member.

Note that some of these filtering options (service provider and requesting member in particular) are especially useful in "Month" view, to see everything being done for a specific member or by a specific service provider in one month.

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## Services Menu

The following clickable links are available at the top of the screen. Each of these options is discussed in more detail in the following sections.

*Figure 3.2 – Options in the Services and Service Requests screen*

Before you start to use the **Service Request** options, you must step through the options in the **Configure** panel. It is necessary to configure service categories, services, service providers, and responsible staffers before you can start offering services to members.

| Service Requests | |
|---|---|
| Add Service Request | Create a new service request for a member. Specify the type of service provided and link one or more service providers to the request. Contact providers and manage their status. Process the request through to completion and track ratings and comments. |
| Add Office Time Request | Quickly enter service requests for office time, or work performed by volunteers for the village itself. |
| Volunteer Self Signup | This option is only available if your village as paid the one-time fee to activate it. It allows volunteers to login to the website and pick their own service requests to handle. See Chapter 7 for more information. |
| Open Requests | Quickly view all open service requests. A count of open requests is shown. |
| Service Requests Without Date | Allows you to quickly view all service requests for which a date has not yet been assigned. (These requests cannot appear on the main services calendar.) A count is shown. |
| **Output** | |
| To-Do List | Displays a special To-Do List screen, showing open Contact Log & Service Request entries. |
| Reports | Allows you to view and print many reports on services, service providers, service requests, |

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| | |
|---|---|
| | additional contacts, etc. |
| Exports | Allows you to export many different kinds of data to CSV format. |
| Configure | |
| Service Categories | This option allows you to define the categories into which each service will be grouped. |
| Services | Allows you to define the individual services offered by your village to its members. |
| Service Providers | This option allows you to maintain your master list of service providers, including member and non-member volunteers, and approved contractors. You can also maintain their vettings, history, availability, and the services that they individually provide. |
| Service Options | Allows you to update various options that control the behavior of this special function. |
| Metro Areas | This option is only visible for “Hub-and-Spoke” villages. It is discussed in Chapter 4. |
| Responsible Staffers | Maintain the list of responsible staff members for each service and for followups. |
| Standard Destinations | Define a list of standard or common destinations that members often need to travel to. This option simplifies the process of creating transportation service requests. |

## *CONFIGURE PANEL*

### Service Categories

Select **Configure – Service Categories** to update the categories into which your services are organized. You will see a screen similar to the following:

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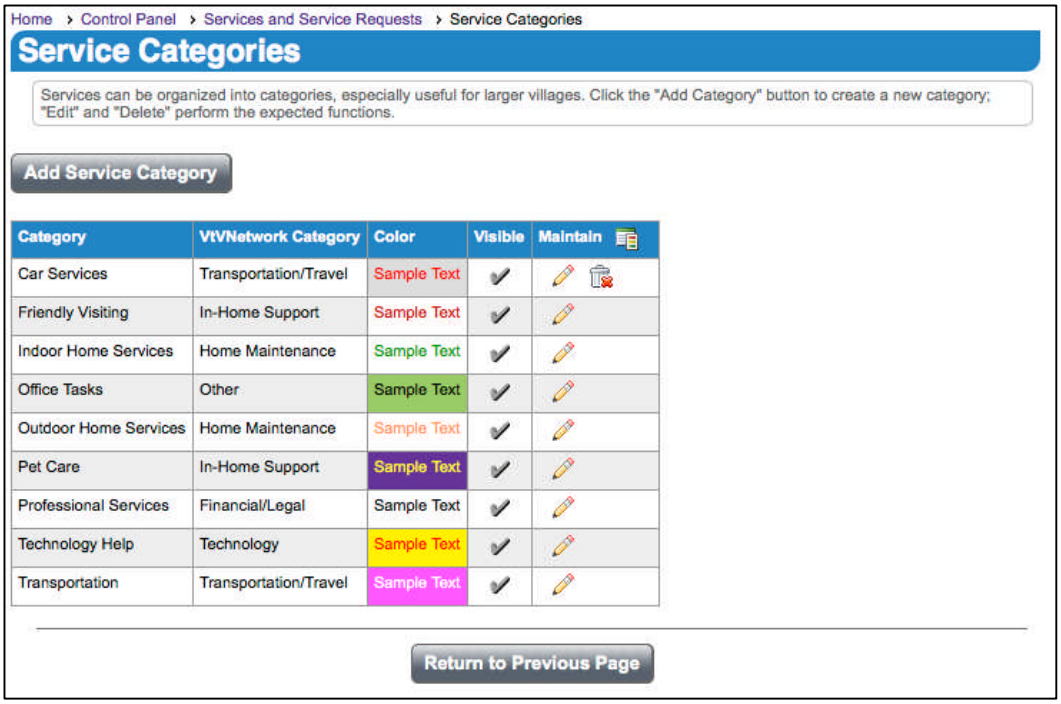


*Figure 3.3 – Service Categories*

You can define any categories you want and each can be color coded for the Service Scheduler. Click **Add Service Category** to create a new category. You will see the following dialog screen:

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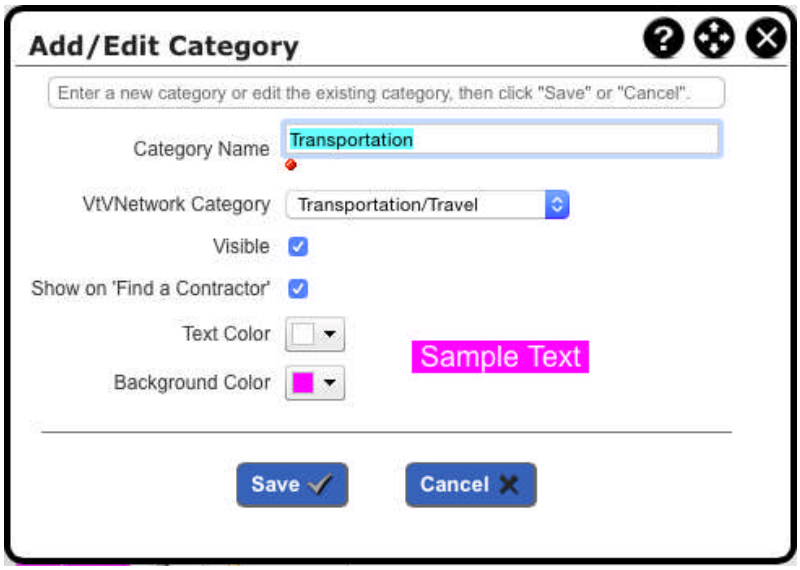


*Figure 3.4 – Add/Edit Service Category*

Enter a category name. You must also select the most appropriate VtVNetwork category; the network will use these "higher-level" categories for reporting and data analysis.

The **Visible** flag should initially be checked. However, it can be unchecked in the future if you need to stop offering a particular category of service.

If the "Find a Contractor" module is enabled, check this box to include service requests from this category in the module. This option is typically only checked for service requests being filled by contractors (where a fee applies.)

You can also select a text color and background color for each category. Clicking one of the color options displays a color picker with multiple options for selecting a color. Use the "Web Palette" option to pick a color that can safely be rendered on all types of computers and browsers.

Click **Save** to save your changes and return to the Service Categories screen, or **Cancel** to return without saving.

On the main grid, click the **Edit** icon to update and service category. A **Delete** icon will be shown if no services are linked to the category; click it to delete the category. You will be prompted to confirm this action.

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## Services

Select **Services** to update the services provided by your village. You will see a screen similar to the following:

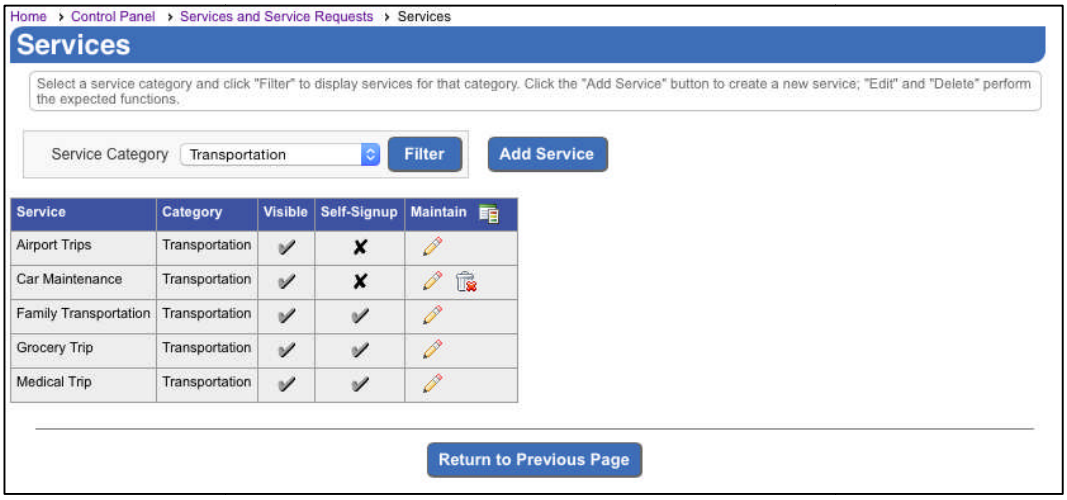


*Figure 3.5 – Services*

Click the **Filter** button to display all services, or select a category before clicking the button to display just services in that category. (Many villages offer more than 100 different services, organized into 10-20 major categories, so this list can get quite long.)

The grid shows services, the category into which each service is organized, and whether that service is currently visible. As with categories, use the Visible flag to turn services off which are no longer being offered, or which are seasonal.

If the Volunteer Self Signup function is enabled, this screen will also show which services have been enabled for self-signup. See Chapter 7 for more information.

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Click the **Add Service** button to create a new service. You will see the following dialog:

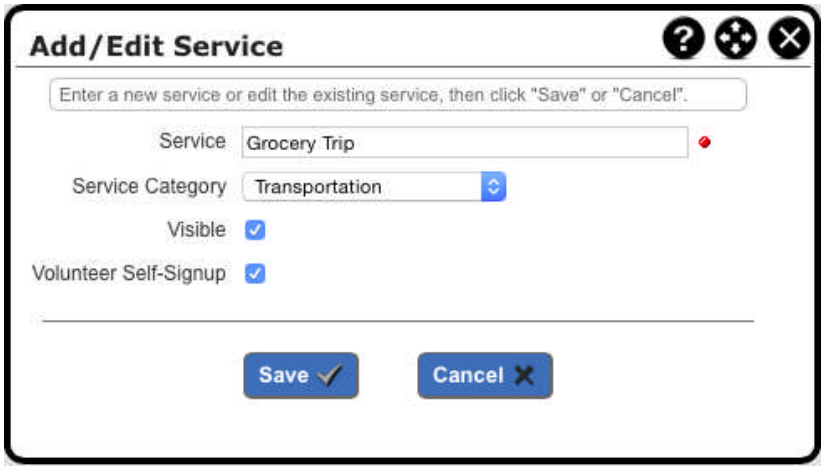


*Figure 3.6 – Add/Edit Service*

Specify the service name, category and whether it should be visible (available to be selected.) If the Volunteer Self-Signup function is enabled, check whether this service should be eligible. Only eligible service requests will appear on the Volunteer Self-Signup list.

Click **Save** to save your change and return to services list, or **Cancel** to return without saving.

Click the **Edit** icon to modify a service; you will see the same screen as above. A **Delete** icon will only be displayed if that service has never been scheduled. When you click this link, you will be asked to confirm this action.

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## Service Providers

Select **Configure – Service Providers** to update the contractors and volunteers (member and non-member) who provide services to your members. You will see a screen similar to the following:

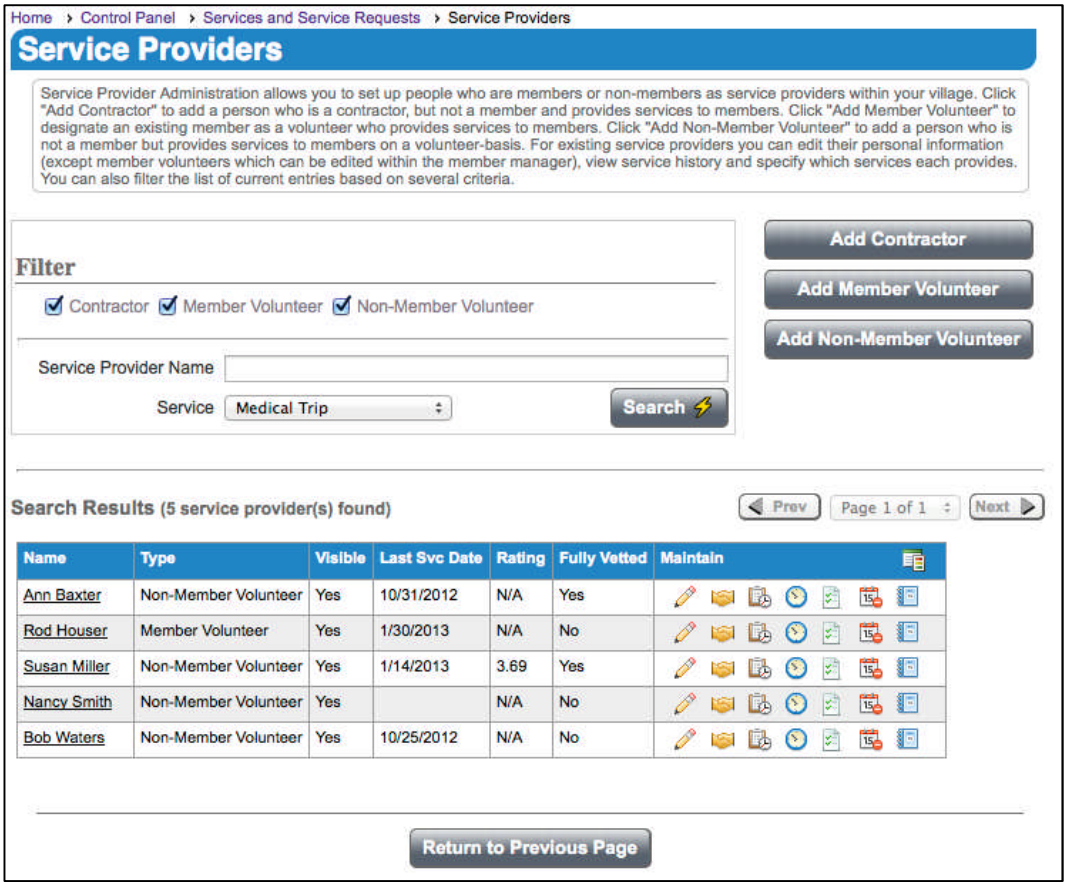
Home › Control Panel › Services and Service Requests › Service Providers
Service Providers
Service Provider Administration allows you to set up people who are members or non-members as service providers within your village. Click "Add Contractor" to add a person who is a contractor, but not a member and provides services to members. Click "Add Member Volunteer" to designate an existing member as a volunteer who provides services to members. Click "Add Non-Member Volunteer" to add a person who is not a member but provides services to members on a volunteer-basis. For existing service providers you can edit their personal information (except member volunteers which can be edited within the member manager), view service history and specify which services each provides. You can also filter the list of current entries based on several criteria.
Filter
Contractor
Member Volunteer
Non-Member Volunteer
Service Provider Name
Service
Medical Trip
Search
Add Contractor
Add Member Volunteer
Add Non-Member Volunteer
Search Results (5 service provider(s) found)
Prev
Page 1 of 1
Next
Name
Type
Visible
Last Svc Date
Rating
Fully Vetted
Maintain
Ann Baxter
Non-Member Volunteer
Yes
10/31/2012
N/A
Yes
Rod Houser
Member Volunteer
Yes
1/30/2013
N/A
No
Susan Miller
Non-Member Volunteer
Yes
1/14/2013
3.69
Yes
Nancy Smith
Non-Member Volunteer
Yes
N/A
No
Bob Waters
Non-Member Volunteer
Yes
10/25/2012
N/A
No
Return to Previous Page

*Figure 3.7 – Service Providers*

The system supports three types of service providers: contractors, member volunteers, and non-member volunteers. In general, contractors are used for professional and trade services such as plumbing or electrical work, and receive payment for their services. Contractors and non-member volunteers are stored in the non-member database, each in a special category created for this purpose.

Each behaves slightly differently. Use the Filter and Search options then click **Search** to limit the service providers shown in the grid. 30 providers are shown at a time; use the page navigation buttons to move forward and backward. A value entered in the Service Provider Name box will be found anywhere in the field.

Each service provider includes their name and type, whether they are currently visible, the most recent date that they provided a service, their current average rating, and whether they are fully vetted. The options in the Maintain column are described below.

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Click the service provider's name to see a small popup with their contact information, including address, phone numbers, email address and website.

*Figure 3.8 – Contact Info*

The following options are available in the Maintain column (each is described in more detail below):

| | |
|---|---|
| (Edit) | Change contact and other information for this service provider. |
| (History) | View the history of services provided, including upcoming services. |
| (Vettings) | Track vettings, including background and license checks, insurance, references, etc. |
| (Services) | Link this provider to the services that he or she provides. |
| (Availability) | Track general availability for each day and general time ranges. |
| (Not Available) | Track specific dates in which a provider is not available (for example, a college student who has exams or is out-of-town during breaks. |
| (Reports) | Run reports on this service provider. |
| (Reset Password) | This option will only appear if the Volunteer Self-Signup function is enabled (see Chapter 7.) It allows admins to send a new username and password to a non-member volunteer. |

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Click one of the “Add” buttons to add a service provider of the specified type.

## Add Contractor

When you click the **Add Contractor** button, you will see the following dialog:

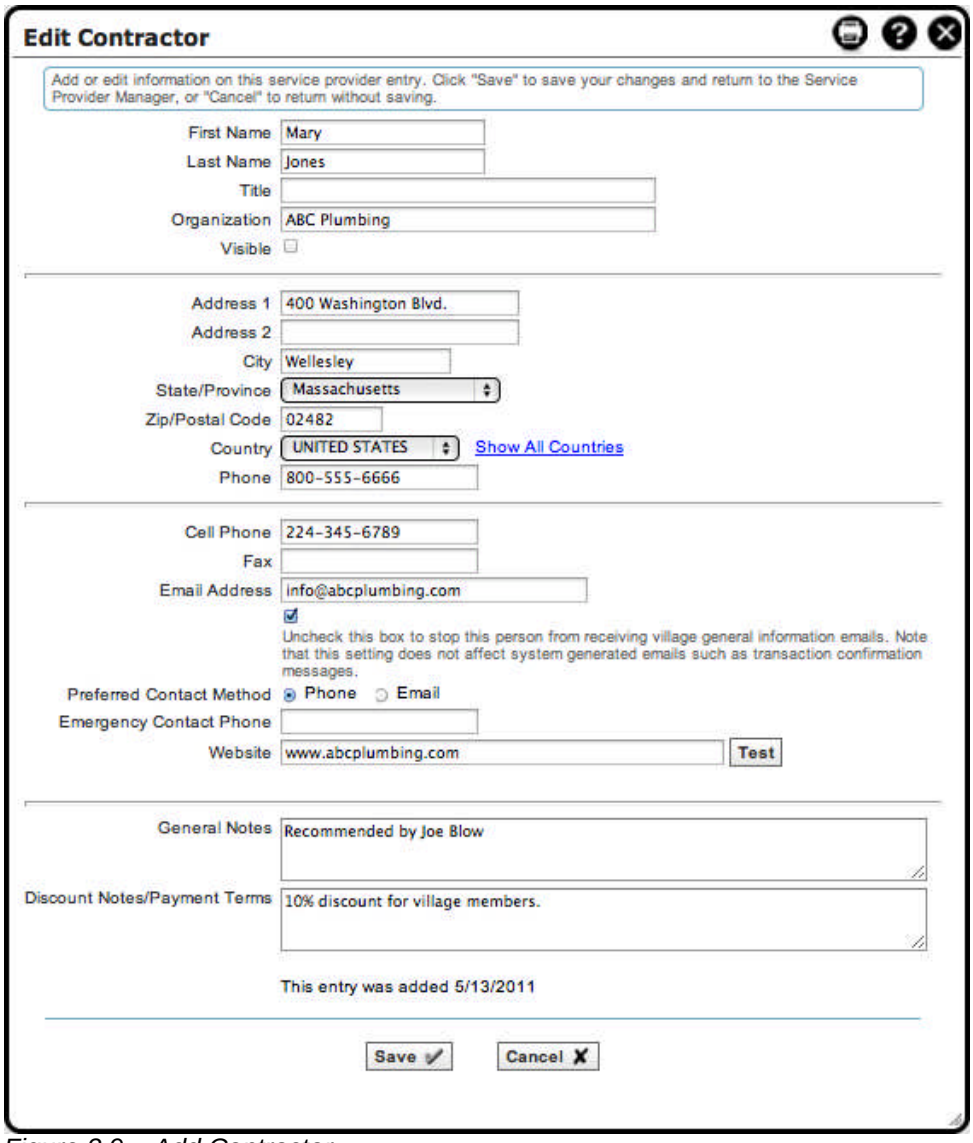


*Figure 3.9 – Add Contractor*

None of this information is required but we recommend you enter either a company name or the first name and last name of the contractor. Use the “Visible” flag to control whether this contractor is currently active for your village.

The General Notes field is available for general comments about this contractor. The Discount Notes/Payment Terms field is available to track special offers or arrangements for village members.

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Click **Save** to save the new contractor into the database and return to the main screen, or **Cancel** to return without saving.

## Add Member Volunteer

Many villages require members to do some volunteer work for the village as part of their commitment to being a member. When you click the **Add Member Volunteer** button, you will see the following dialog:

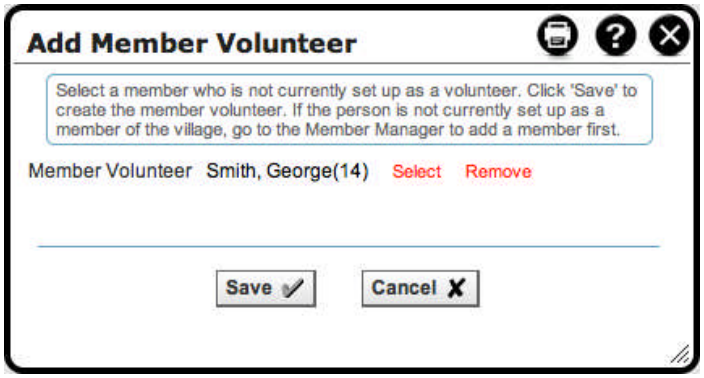
Add Member Volunteer
Select a member who is not currently set up as a volunteer. Click 'Save' to create the member volunteer. If the person is not currently set up as a member of the village, go to the Member Manager to add a member first.
Member Volunteer Smith, George(14) Select Remove
Save
Cancel

*Figure 3.10 – Add Member Volunteer*

Click the Select link to display the standard member selector. Select a member and click **Select**. Click **Save** to add this member to the roster of volunteers and return to the main screen, or **Cancel** to return without saving.

## Add Non-Member Volunteer

When you click the **Add Non-Member Volunteer** button, you will see a similar dialog box as for a Contractor. When you click the Save button, the information is stored in the database but flagged as a volunteer who does not receive payment for his or her services, vs. a contractor who generally does receive payment, whether from the village or the member.

## Edit

Select the Edit icon to modify the contact information for a service provider. You will see dialogs similar to the ones above.

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## Services

Click the **Services** icon to specify which services each service provider provides. You will see a dialog similar to the following:

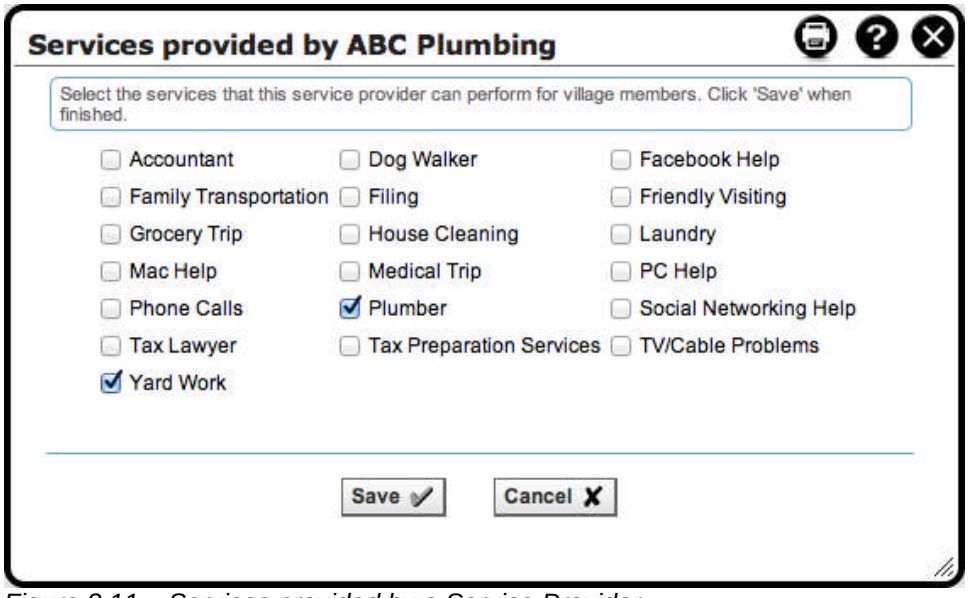


*Figure 3.11 – Services provided by a Service Provider*

Check any number of services, then click **Save** to save your changes and return to the main screen, or **Cancel** to return without saving.

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## History

Click this icon to view a list of all services provided by this service provider, both past and future. You will see a dialog similar to the following:

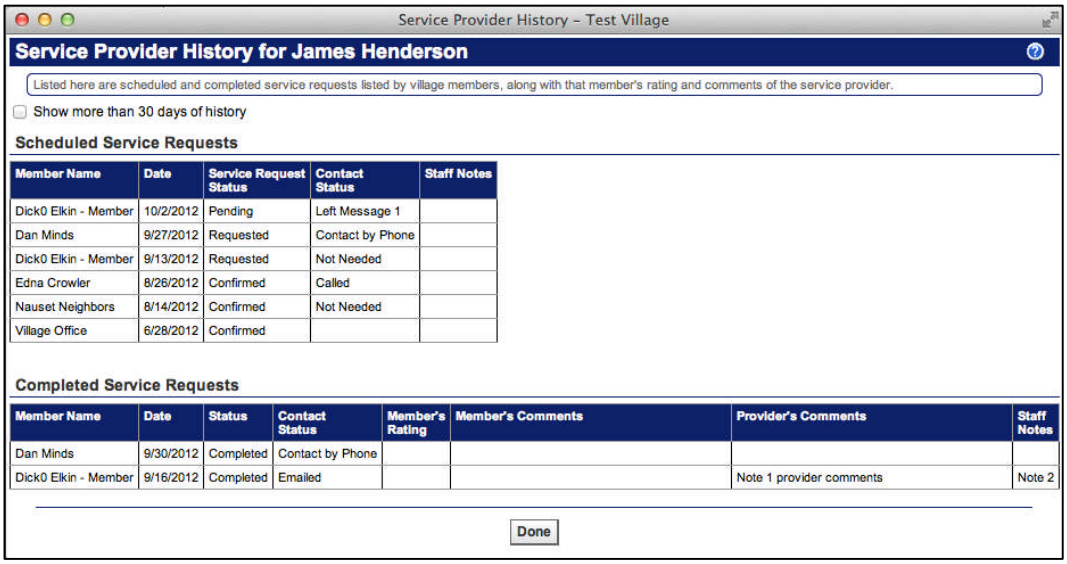
Service Provider History – Test Village
Service Provider History for James Henderson
Listed here are scheduled and completed service requests listed by village members, along with that member's rating and comments of the service provider.
Show more than 30 days of history
Scheduled Service Requests
Member Name | Date | Service Request Status | Contact Status | Staff Notes
Dick0 Elkin - Member | 10/2/2012 | Pending | Left Message 1 |
Dan Minds | 9/27/2012 | Requested | Contact by Phone |
Dick0 Elkin - Member | 9/13/2012 | Requested | Not Needed |
Edna Crowler | 8/26/2012 | Confirmed | Called |
Nauset Neighbors | 8/14/2012 | Confirmed | Not Needed |
Village Office | 6/28/2012 | Confirmed |
Completed Service Requests
Member Name | Date | Status | Contact Status | Member's Rating | Member's Comments | Provider's Comments | Staff Notes
Dan Minds | 9/30/2012 | Completed | Contact by Phone |
Dick0 Elkin - Member | 9/16/2012 | Completed | Emailed | Note 1 provider comments | Note 2
Done

*Figure 3.12 – Service Provider History*

The top dialog shows future service requests for which this provider is listed. It does not mean that the provider has been selected to provide this service, merely that you have added the provider to the request.

The bottom dialog shows past service requests listed in descending date order, including the member name and date, ratings and comments. By default, the system only shows the past 30 days of history. Check the box to see more than 30 days.

Click **Done** to close the popup and return to the main screen.

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## Availability

Select this option to define general days of the week and time ranges during the day when a service provider is available. This information will be used to show only providers who might be available during the requested time for a service and to exclude providers who are not available. You will see the following screen:

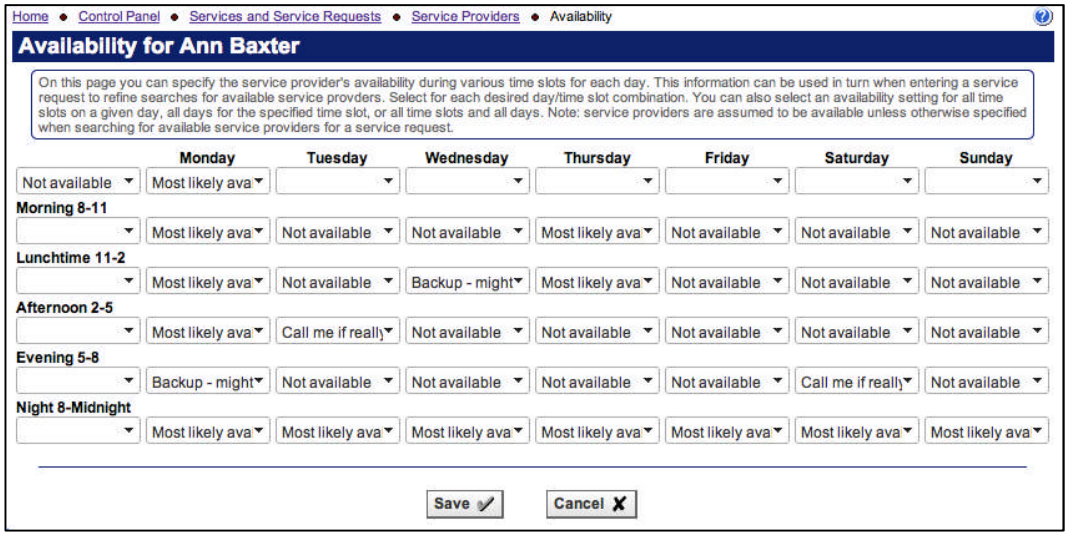
Home • Control Panel • Services and Service Requests • Service Providers • Availability
Availability for Ann Baxter
On this page you can specify the service provider's availability during various time slots for each day. This information can be used in turn when entering a service request to refine searches for available service provders. Select for each desired day/time slot combination. You can also select an availability setting for all time slots on a given day, all days for the specified time slot, or all time slots and all days. Note: service providers are assumed to be available unless otherwise specified when searching for available service providers for a service request.
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
Sunday
Morning 8-11
Lunchtime 11-2
Afternoon 2-5
Evening 5-8
Night 8-Midnight
Save
Cancel

*Figure 3.13 – Service Provider Availability*

Each column represents a day of the week. Each row represents a general time slot:

- Morning – 8:00 AM to 11:00 AM
- Lunchtime – 11:00 AM to 2:00 PM
- Afternoon – 2:00 PM to 5:00 PM
- Evening – 5:00 PM to 8:00 PM
- Night – 8:00 PM to Midnight

For each intersection of a day and time slot, you specify one of four availabilities:

- Most likely available
- Backup – might be available
- Call me if really desperate
- Not available

When it comes time to find matching service providers for a request, you can define the level of availability to expand or contract the list showing who can perform the service. For example, you might start with providers who are “most likely available”. But if no-one volunteers, you might expand the search to include “backups (who) might be available”. And if you still can’t find someone and are getting desperate, you can expand again to include providers at the third level.

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These settings will typically only apply to volunteers (both member and non-member.) Contractors will typically be available at all times (though you might flag them differently for evenings and weekends.)

These options only control whether a provider will appear on the list of possible providers based on general ranges of availability. So if a volunteer tells you that she is available from 10:00 AM until 1:00 PM on Tuesdays, enable her for both the 8:00 AM – 11:00 AM and the 11:00 AM – 2:00 PM slots. She always has the option to decline a 9:00 AM request and accept an 11:00 AM request.

This screen also includes shortcuts to configure a whole column at once (for example, a volunteer who is never available on Tuesdays) or a whole row at once (for example, a volunteer who is never available in the evenings), or even the whole grid.

Click **Save** to save your changes and return to the main Service Providers screen or **Cancel** to return without saving.

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## Vettings

Every service provider needs to be vetted! For contractors, you might need to check references, bonds and licenses, insurance, and criminal record. For drivers, you might need to verify their driving record, run background checks, insurance, etc. Each type of provider will have different requirements and each village also has different standard (for example, 2 background checks vs. 3.)

ClubExpress provides a place for you to enter and maintain these vettings. Some vettings expire while others have no expiration. The system also allows you to flag a provider as “Fully Vetted”. However, it does not attempt to track this for you since every village will have different standards. So you are responsible for flagging and unflagging the “Fully Vetted” option.

When you select this icon, you will see a screen similar to the following:

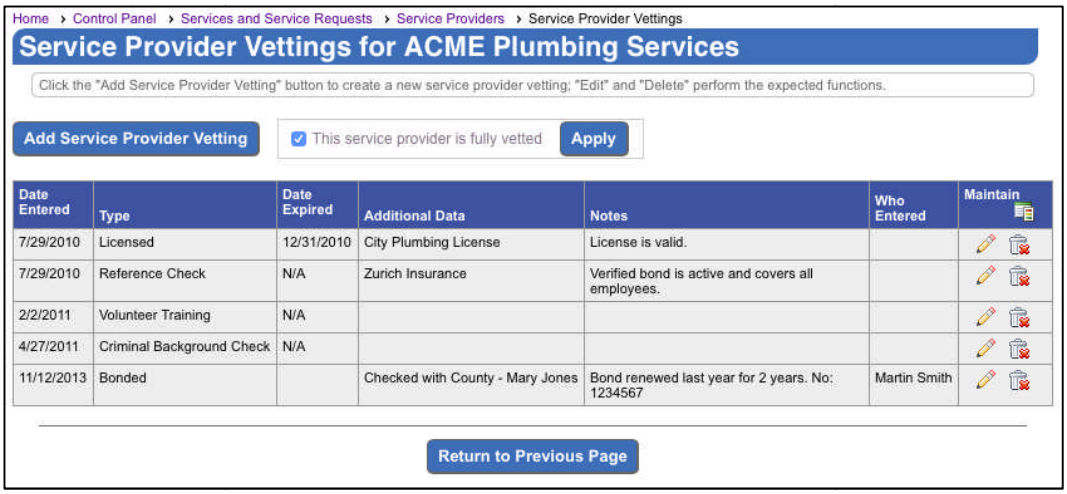


*Figure 3.14 – Service Provider Vettings*

All vettings are shown, ordered by type and date. Some vettings such as bonds and licenses allow you to enter an expiration date, and the system includes a report that shows expired vettings for each provider.

Click the **Add Service Provider Vetting** button to add a new vetting. You will see the following dialog:

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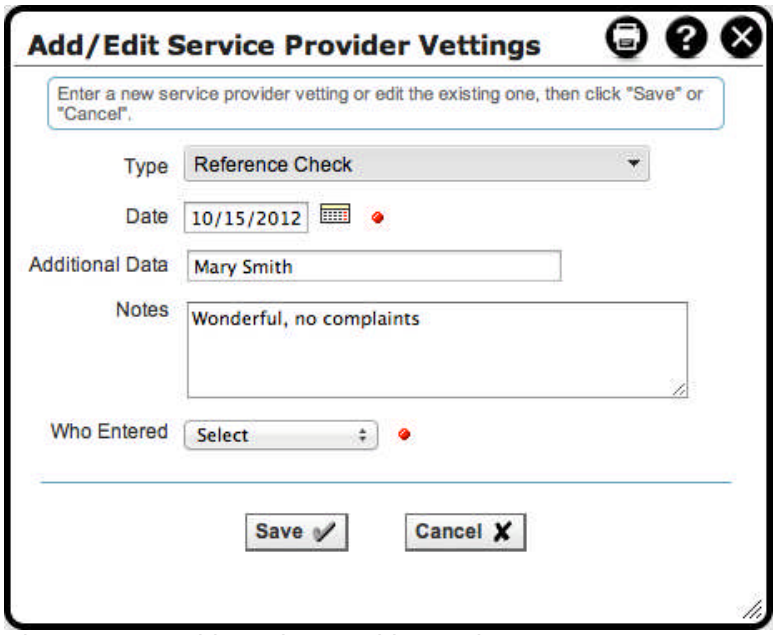


*Figure 3.15 – Add Service Provider Vetting*

Many different types of vettings are available (and new types can easily be added; just contact ClubExpress.) Select a type and date. If a vetting type has an expiration date, you will also see a field to enter this date. Use the Additional Data and Notes fields to enter more information. The "Who Entered" field comes from the list of Responsible Staffers; it will default to the currently logged-in user. Click **Save** to complete the process or **Cancel** to close the dialog without saving.

Back on the main screen, click the **Edit** icon to edit a specific vetting or the **Delete** icon to remove one; you will be prompted to confirm this action.

When you believe that a service provider has been fully vetted, check the box at the top and click **Apply**; the system will flag this provider appropriately. You can also reverse this action by unchecking the box and clicking **Apply** again.

**Important Note:**

**ClubExpress does not enforce the fully vetted flag; it is advisory only and you can still select a service provider who is not fully vetted. Because each village (and state!) has different requirements and policies, you assume all responsibility for deciding whether a particular service provider is ready to be assigned to a service request.**

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## Not Available

Select this option to specify individual dates where a service provider is not available, so that he or she does not appear on the list of possible providers. Use this option, for example, if a volunteer is on vacation, or a college student is in the middle of exams. You will see the following screen:

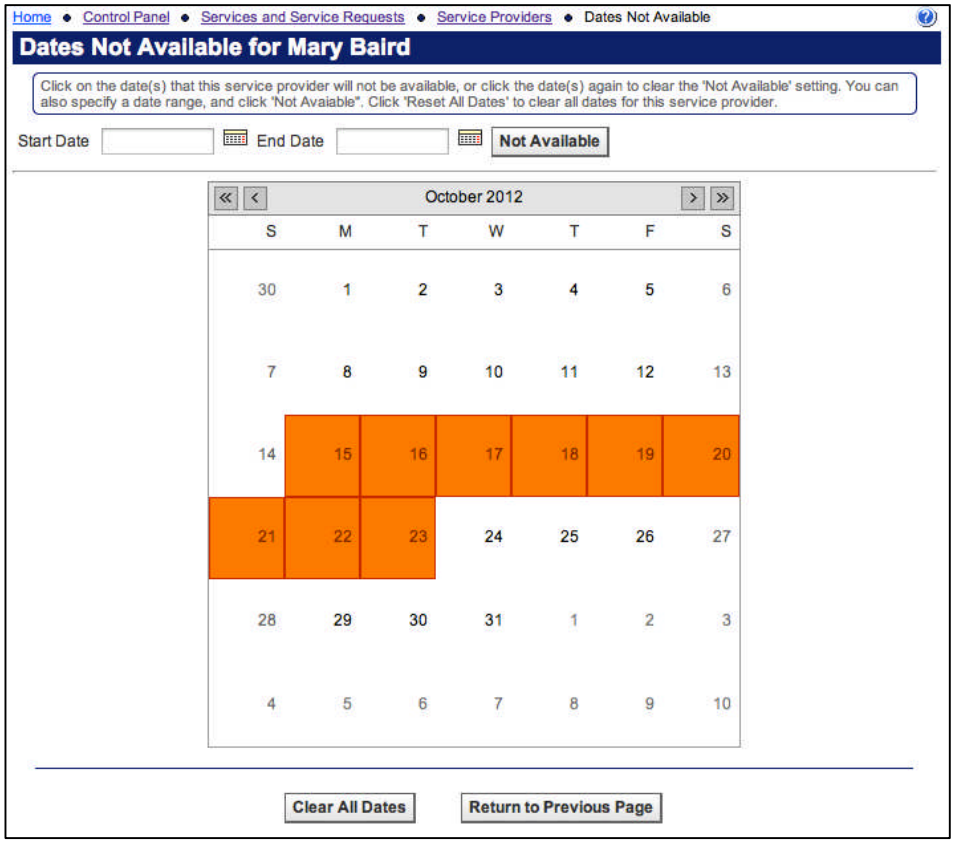
Home • Control Panel • Services and Service Requests • Service Providers • Dates Not Available
Dates Not Available for Mary Baird
Click on the date(s) that this service provider will not be available, or click the date(s) again to clear the 'Not Available' setting. You can also specify a date range, and click 'Not Available'. Click 'Reset All Dates' to clear all dates for this service provider.
Start Date
End Date
Not Available
October 2012
S M T W T F S
30 1 2 3 4 5 6
7 8 9 10 11 12 13
14 15 16 17 18 19 20
21 22 23 24 25 26 27
28 29 30 31 1 2 3
4 5 6 7 8 9 10
Clear All Dates
Return to Previous Page

*Figure 3.16 – Dates Not Available*

Click an individual date to highlight it as not available. Click a highlighted date to clear it. Use the navigation buttons at the top of the grid to move between months or years. You can also specify start and end dates then click the **Not Available** option to highlight a larger range.

Changes are saved immediately; there is no **Save** option. Click the **Clear All Dates** button to clear all "not available" dates (on all months/years.) Click **Return to Previous Page** to return to the Service Providers screen.

## Reports

Select this option to run reports for a specific service provider. You will see the standard ClubExpress reports dialog, allowing you to select a report, specify filtering options if appropriate, and output the report in one of five formats.

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## Service Options

Select this choice to configure basic options for the Services function. You will see the following screen:

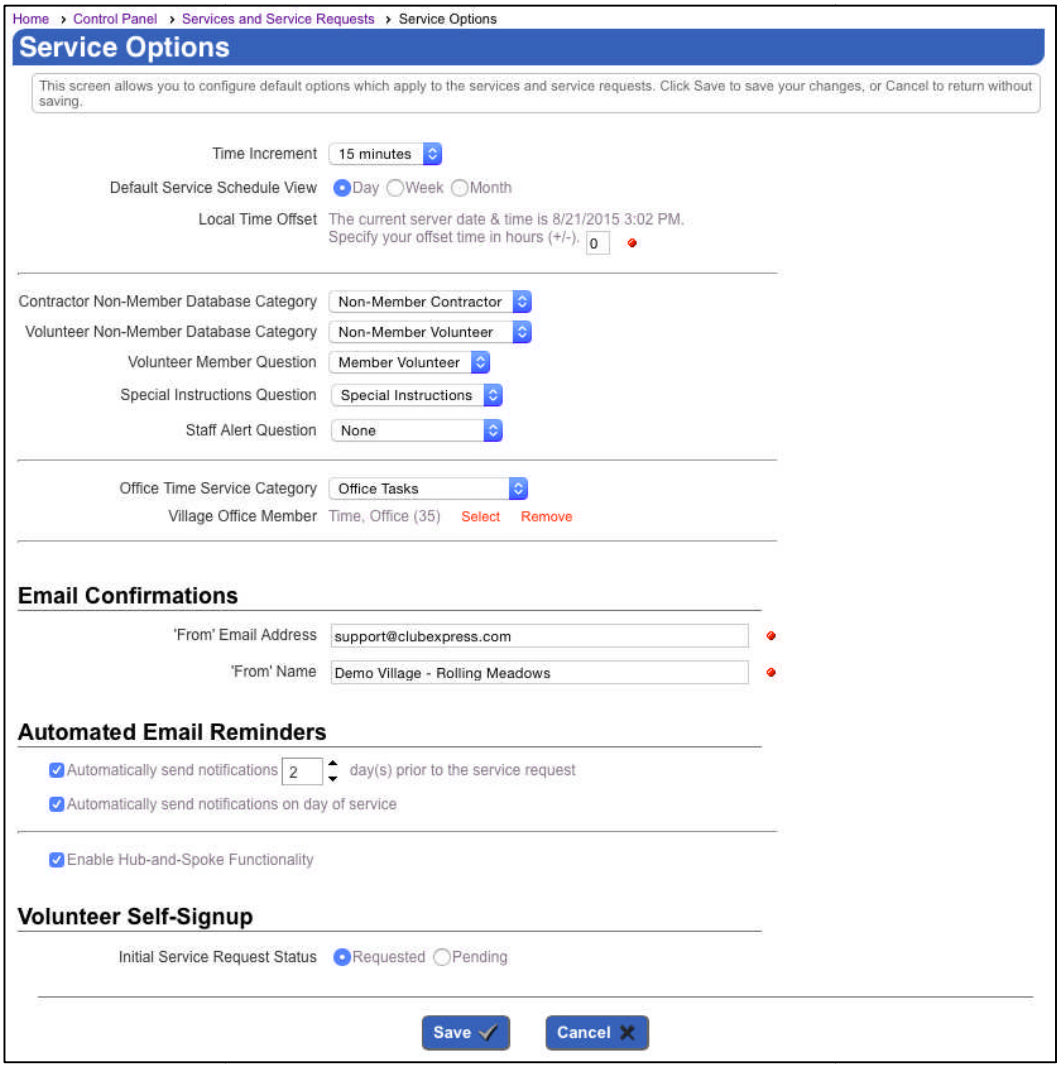


*Figure 3.17 – Service Options*

The following options can be configured:

**Time Increment** controls what times are displayed when you are configuring a service request. For example, if you specify 10 minutes, then the popup timer shows X:00, X:10, X:20, X:30, X:40, and X:50 within each hour. Note that you can always type any time directly into the box.

**Default Service Schedule View** defines whether you will see day, week or month view when you open the Member Services function

**Contractors and Non-Member Volunteers** are stored in the non-member database of your website (Control Panel – People tab – Non-

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Member Database.) Use the next options to specify which category in the non-member database defines contractors and which category defines non-member volunteers. These settings allow the system to retrieve the correct list of people each time.

**Member Volunteers** are, naturally, stored in the Member Database. We use an "Additional Member Data" question to define which members are willing to volunteer. The next setting defines which question to use.

**Special Instructions** can be configured for each member (for example, "Mary uses a walker and needs help going up steps.") These instructions will automatically be added to service request confirmation emails. This settings tells the services module which question to use.

**Staff Alert Question** allows you to link an additional member data question to the staff alert function. If this option is enabled and the answer to that question is not blank, a large alert icon will appear when you are adding or editing a service request. Clicking the icon displays the answer in an alert box.

**Office Time** – the system provides a streamlined screen to enter and track office time by volunteers. The next option defines which Service Category represents office time and the various services within (for example, database updating, answering the phone, filing, calling members, etc.)

**Village Office Member** – Each service, whether provided for a member or for the village office, needs to be assigned to a member. This option allows you to specify a dummy member account to which all office time requests will be linked.

**Email Confirmations** allows you to define the email address and name that appear in the "From:" field for outgoing service request emails.

**Automated Email Reminders** allows you to define when reminder notifications are sent.

**Enable Hub-and-Spoke Functionality** – this option is discussed in Chapter 4. If you are not a hub-and-spoke village, leave it unchecked.

**Volunteer Self-Signup (VSS) – Initial Service Request Status** – this option tells the system what status to use for an initial service request that's enabled for volunteer self-signup (see Chapter 7.) This option will only be displayed if the VSS function has been enabled, which requires a one-time fee.

> For some villages, a new service request (whether created by members from their Profile screens, or by a staff member) always has a status of "Requested". When the village starts working on the request and assigns a volunteer, the status changes to

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"Pending", and when the member confirms the arrangements, the status is changed to "Confirmed".

For other villages, a new service request created by members from their Profile screens has a status of "Requested". Service requests created by staff members have a status of "Pending" and once someone is assigned to the request, the status is changed to "Confirmed".

Click **Save** to save your changes and return to the main Service Requests screen, or **Cancel** to return without saving.

## Responsible Staffer

This option displays the same screen as the choice in the Open Contact Log screen, allowing you to define responsible staffers within the village to followup with members. Responsible staffers are tracked for all service requests and office time requests, and also for vettings.

For more information, see page 11.

## Standard Destinations

This option allows villages to more quickly create transportation service requests to the locations that members are commonly taken to. When you select this option, you will see a screen similar to the following:

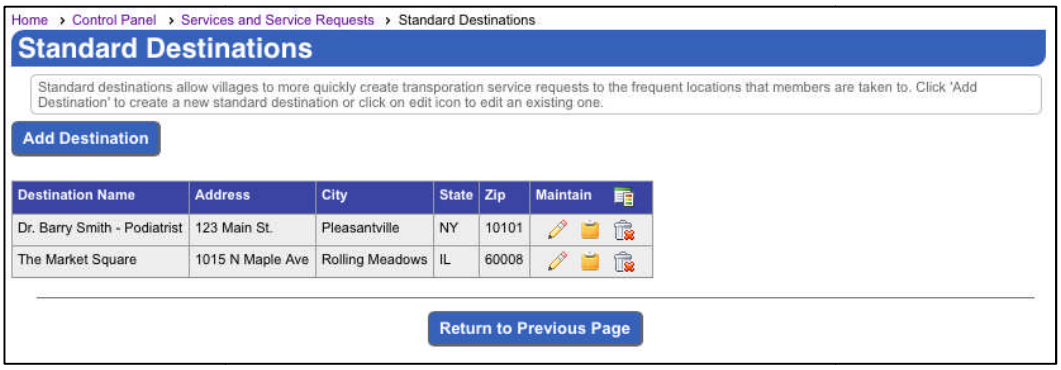
Home › Control Panel › Services and Service Requests › Standard Destinations
Standard Destinations
Standard destinations allow villages to more quickly create transporation service requests to the frequent locations that members are taken to. Click 'Add Destination' to create a new standard destination or click on edit icon to edit an existing one.
Add Destination
Destination Name
Address
City
State
Zip
Maintain
Dr. Barry Smith - Podiatrist
123 Main St.
Pleasantville
NY
10101
The Market Square
1015 N Maple Ave
Rolling Meadows
IL
60008
Return to Previous Page

*Figure 3.18 – Standard Destinations*

Click **Add Destination** to create a new destination. You will see the following popup dialog:

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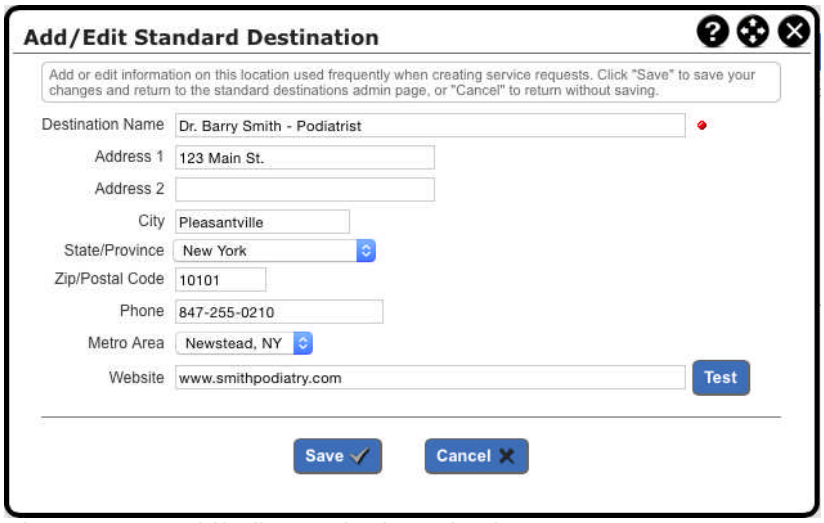


*Figure 3.19 – Add/Edit Standard Destination*

Enter the necessary information and click **Save** to save your choice, or **Cancel** to close without saving.

If a doctor, bank or grocery store or other common entry has multiple locations use the Destination Name field to separate them. For example:

- Smith Podiatry – Uniontown
- Smith Podiatry – Pleasantville

If a full address is specified, the system will include a Google Maps link in the confirmation email to the volunteer, making it easier to find the location using a smartphone or GPS-equipped vehicle. The phone number is also in the confirmation email in case the volunteer and member have a problem.

On the main screen, click the **Edit** icon to modify an existing destination. Click the **Copy** icon to copy an existing standard destination to a new one (for example, if a doctor has multiple offices.) Click the **Delete** icon to remove a standard destination. This will not affect service requests to that destination that have already been filled.

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## *ADD SERVICE REQUEST*

Click the **Add Service Request** link to create a new service request. You will see a screen similar to the following:

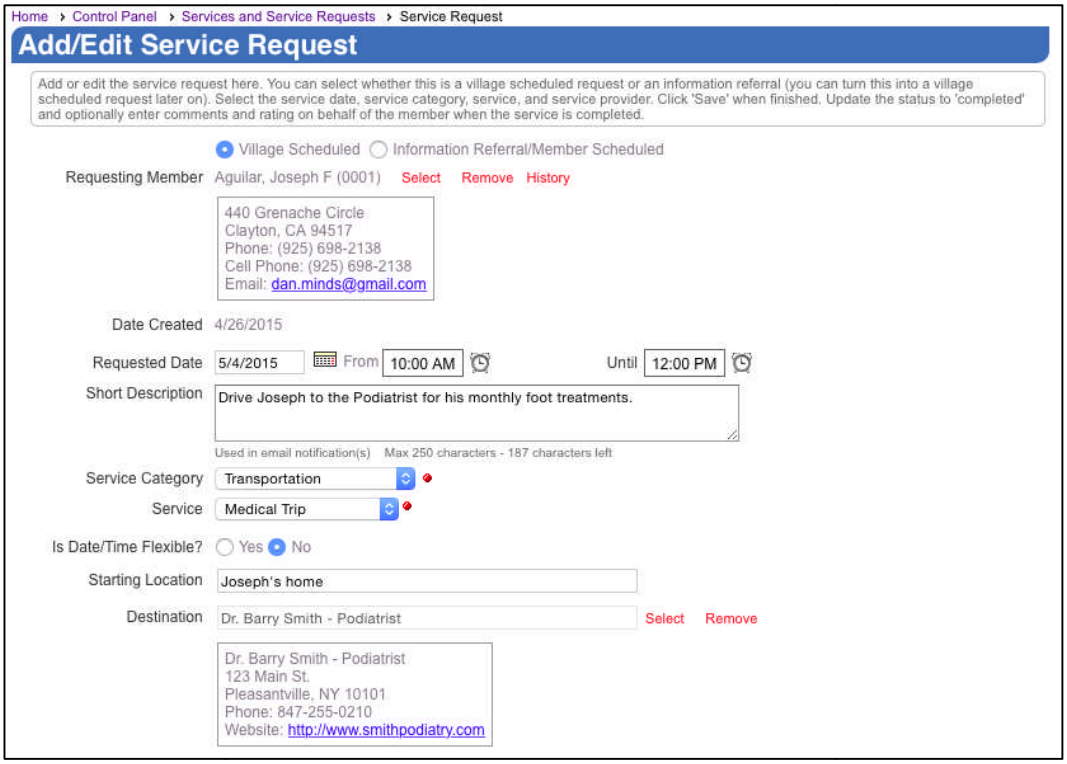
Home › Control Panel › Services and Service Requests › Service Request
Add/Edit Service Request
Add or edit the service request here. You can select whether this is a village scheduled request or an information referral (you can turn this into a village scheduled request later on). Select the service date, service category, service, and service provider. Click 'Save' when finished. Update the status to 'completed' and optionally enter comments and rating on behalf of the member when the service is completed.
Village Scheduled
Information Referral/Member Scheduled
Requesting Member
Aguilar, Joseph F (0001)
Select
Remove
History
440 Grenache Circle
Clayton, CA 94517
Phone: (925) 698-2138
Cell Phone: (925) 698-2138
Email: dan.minds@gmail.com
Date Created
4/26/2015
Requested Date
5/4/2015
From
10:00 AM
Until
12:00 PM
Short Description
Drive Joseph to the Podiatrist for his monthly foot treatments.
Used in email notification(s)
Max 250 characters - 187 characters left
Service Category
Transportation
Service
Medical Trip
Is Date/Time Flexible?
Yes
No
Starting Location
Joseph's home
Destination
Dr. Barry Smith - Podiatrist
Select
Remove
Dr. Barry Smith - Podiatrist
123 Main St.
Pleasantville, NY 10101
Phone: 847-255-0210
Website: http://www.smithpodiatry.com

*Figure 3.20a – Add Service Request – top part*

There are two types of service requests and the screen behaves slightly differently for each:

- **Village Scheduled** – the village makes all the arrangements with the service provider.
- **Information Referral Only** – the village recommends one or more service providers but it's up to the member to call and make specific arrangements.

### Requesting Member

Select the requesting member by clicking the **Select** link. When you do so, the screen refreshes to show the member's address and contact information. If Special Instructions have been defined for a member, these will also be filled into the field lower down on the form. If a Staff Alert field has been defined, and if there's a value in the field for the selected member, a red "alert" icon will appear. Click it to display a popup screen showing the alert information.

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Click the **Remove** link to remove the member and the **History** link to view a popup screen showing that member's history of service requests, similar to the following:

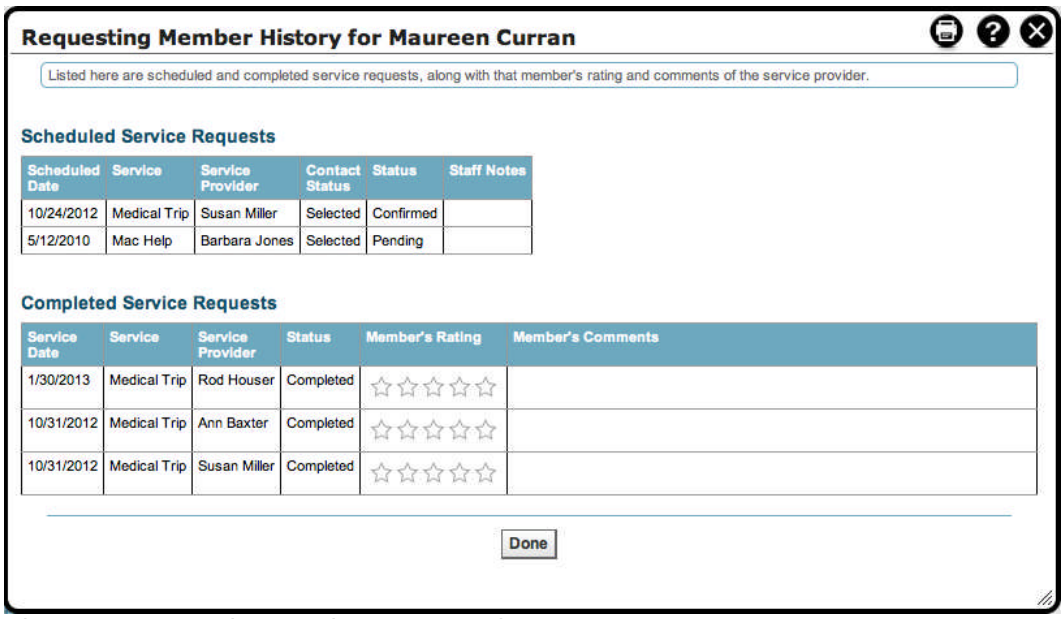
Requesting Member History for Maureen Curran
Listed here are scheduled and completed service requests, along with that member's rating and comments of the service provider.
Scheduled Service Requests
Scheduled Date | Service | Service Provider | Contact Status | Status | Staff Notes
10/24/2012 | Medical Trip | Susan Miller | Selected | Confirmed |
5/12/2010 | Mac Help | Barbara Jones | Selected | Pending |
Completed Service Requests
Service Date | Service | Service Provider | Status | Member's Rating | Member's Comments
1/30/2013 | Medical Trip | Rod Houser | Completed
10/31/2012 | Medical Trip | Ann Baxter | Completed
10/31/2012 | Medical Trip | Susan Miller | Completed
Done

*Figure 3.21 – Member Service Request History*

Click **Done** to close the popup screen.

## Requested Date and Time

The system next allows you to specify the requested date and time. Click the calendar icon to select a date. In the time fields, you can enter any time (for example, "10:23 AM") or click the clock icons to see a popup list of predefined times (the intervals can be configured on the Service Options screen.)

## Short Description

Use this field to describe the service that's going to be provided, including specific names if necessary. You can enter a maximum of 250 characters; a counter will show how many characters are left.

## Service Category and Service

When you select the Service Category, the list of Services changes dynamically to show only services in that category. Select a service from the list.

## Display for Online Signup

If the Volunteer Self-Signup (VSS) module is enabled (see Chapter 7) and if the specified service is eligible for self-signup, this question will appear below the Service question. Check **Yes** if you want this service request to appear on the

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VSS list, or **No** if it should not appear and will, instead, be assigned by a village staff-member.

## Is Date/Time Flexible?

Click **Yes** if the volunteer can work with the member to adjust the date and time. This may allow more volunteers to be interested in signing up for this service request.

## Starting Location

Specify the starting location for this request. For most requests, this will likely be the member's home.

## Destination

Click the **Select** link to select a standard location from a popup list. The details of that location are displayed under the field. Click **Remove** to remove a standard location. You can type anything into the Destination field if a standard location has not been specified.

The Add/Edit Service Request screen continues below:

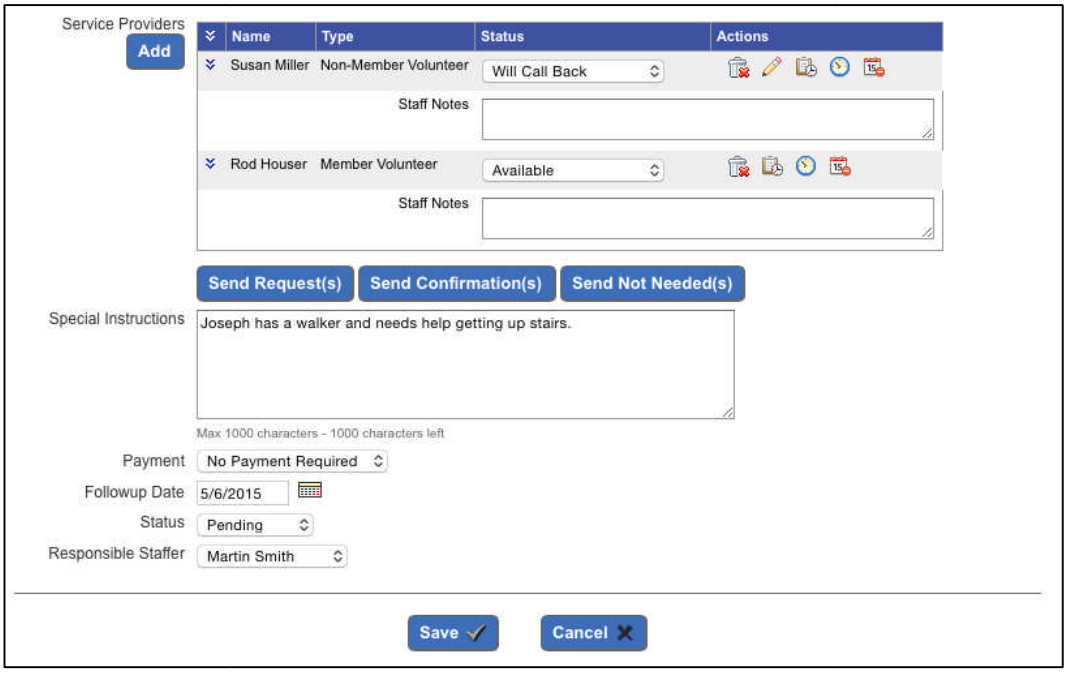


*Figure 3.20b – Add/Edit Service Request – bottom part*

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## Service Providers

The system supports multiple service providers linked to each service request.

- While you are scheduling and specifying the service request, you might be talking to multiple volunteers, only one of which will eventually be matched.

- Some service requests require more than one volunteer, such as a driver to take a member with kidney failure to the hospital for dialysis and another driver to return the member to her home a few hours later.

- For Information Referral requests, you might give the member three names (plumbers, for example.) The system allows you to track which one was chosen by the member to do the work and why, but also which ones were not chosen and why.

Click the **Add** button to add one or more service providers to the request. You will see a screen similar to the following:

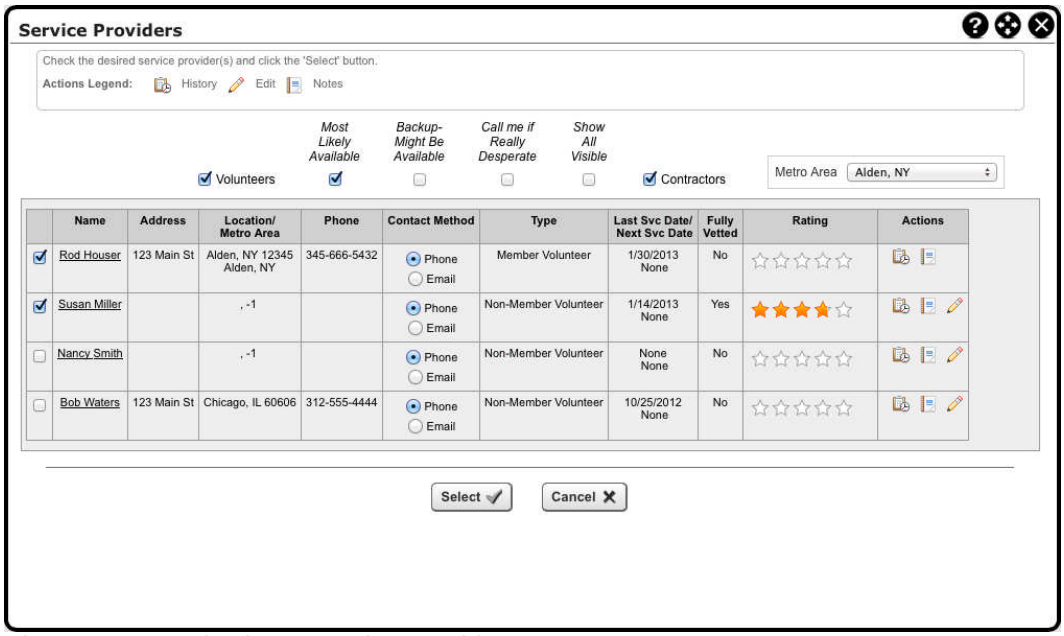
Service Providers
Check the desired service provider(s) and click the 'Select' button.
Actions Legend: History Edit Notes
Most Likely Available
Backup-Might Be Available
Call me if Really Desperate
Show All Visible
Volunteers
Contractors
Metro Area Alden, NY
Name
Address
Location/ Metro Area
Phone
Contact Method
Type
Last Svc Date/ Next Svc Date
Fully Vetted
Rating
Actions
Rod Houser 123 Main St Alden, NY 12345 Alden, NY 345-666-5432 Phone Email Member Volunteer 1/30/2013 None No
Susan Miller , -1 Phone Email Non-Member Volunteer 1/14/2013 None Yes
Nancy Smith , -1 Phone Email Non-Member Volunteer None None No
Bob Waters 123 Main St Chicago, IL 60606 312-555-4444 Phone Email Non-Member Volunteer 10/25/2012 None No
Select
Cancel

*Figure 3.22 – Selecting a Service Provider*

For a Service Request, by default, the system will check the Volunteers option. For an Information Referral, by default, the system will check the Contractors option.

Initially, the “Most Likely Available” option is checked. If you don’t see enough volunteers, or if your initial attempts to match a volunteer with this request don’t pan out, you can check “Backup – Might be Available” or even the “Call me if Really Desperate” options. As a last resort, or for a staff coordinator who really knows her volunteers, check the “Show All Visible” option to ignore all availability definitions and show all service providers who provide this service.

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For all service providers listed, the system shows their name, type, and contact information, including preferred contact method. You will also see their last and next service dates, whether they are fully vetted, and their average rating for all services for which a rating was recorded (for calculation purposes, the system ignores services without a rating.)

Click the provider's name to see a popup screen with their contact information (similar to Figure 3.8 above.)

Click the **History** icon to see a popup screen showing that provider's history (similar to Figure 3.19 above.)

Click the **Notes** icon to see a popup screen where you can view or write notes about this service provider. This is the same Notes screen available in the Member Manager for a member, or as a text box on the non-member Add/Edit screen.

Click the **Edit** icon for a non-member volunteer or contractor to update their general information.

To add providers to a service request, check one or more boxes in the leftmost column and then click the **Select** button. Or click **Cancel** to close the dialog without selecting providers.

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## Working with Selected Service Providers

When you have selected one or more service providers to link to the service request, the screen will look like this:

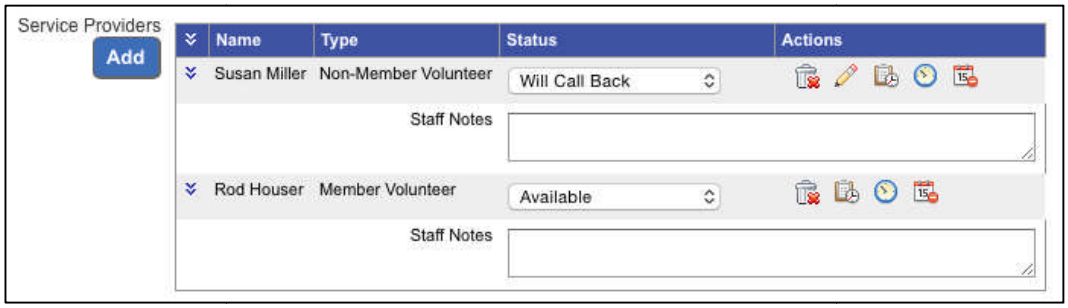


*Figure 3.23 – Selected Service Providers*

Click the small double arrow symbol beside the provider's name to see their contact information. Click the symbol again to close this panel.

The following icons are available in the Actions column:

| | |
|---|---|
| (Delete) | Remove this service provider from the list. |
| (Edit) | Change contact and other information for this service provider. |
| (History) | View the history of services provided, including upcoming services. |
| (Availability) | Track general availability for each day and general time ranges. |
| (Not Available) | Track specific dates in which a provider is not available (for example, a college student who has exams or is out-of-town during breaks. |

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## Service Provider Status Codes

Each provider linked to a service has a status code, from one of the following values:

| | |
|---|---|
| Contact by Phone | Selected when you first add a provider to the list, based on his or her preferred contact method. Can be changed to the other type. |
| Contact by Email | Selected when you first add a provider to the list, based on his or her preferred contact method. Can be changed to the other type. When you click the **Send Request(s)** button, emails are sent to every provider with this status. |
| Called | Select this option after you have called a provider but if you didn't leave a message. |
| Emailed | Select this option after you have emailed a provider. This option is also selected automatically by the system when you click the **Send Request(s)** button, for all providers to whom an email was sent. |
| Left Message 1 | Select this option if you called and left a message for a provider. |
| Left Message 2 | Select this option if you called and left a second message for a provider. |
| Will Call Back | Select this option if you called and spoke to a provider, who said he or she will call you back. |
| Not Available | Select this option if the provider told you or emailed you that he or she was not available this time. |
| Available | Select this option if the provider told you or emailed you that he or she was available for this request. |
| Selected | Select this option when you have chosen one or more service providers to fulfill this request. When you click the **Send Confirmation(s)** button, confirmation emails will be sent to every provider with this status (regardless of their preferred contact method.)<br><br>Selected Providers appear at the top of the list. |

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| | |
|---|---|
| Not Needed | Once you have chosen one or more providers to fulfill this request, change the others to Not Needed if you want to notify them. (If you don't need to notify them, you can simply delete them.) |
| Not Needed/Notified | When you click the **Send Not Needed(s)** button, an email telling providers that their services are not needed for this request will be sent to everyone with the "Not Needed" status, after which this status will be set. |
| Cancel | Select this status for a "Selected" provider if the request was canceled or modified and their services are no longer required. (For example, you might have originally needed two volunteers but now you only need one.) |

The **Staff Notes** field is used to write brief notes about your contact with each service provider (for example, perhaps someone is only available if the time of the request can be changed up or down.)

When changes are made to a service provider's status or when an email is sent to that service provider, the Staff Notes will be updated with a date/timestamp, an indication of what change was made, and the administrator's name who made the change. (Note that the default date/timestamp value is based on the US Central time zone. To change this, go to the Service Options screen.) New notes are added at the top of the Staff Notes field so that the most recent changes appear first.

## Action Buttons

Click the **Send Request(s)** button to send an email to every provider with a status of "Contact by Email". (Providers with a status of "Contact by Phone" need to be handled one at a time with a phone call. The email provides the details of the request and asks for a response. Once the email has been sent, their status is changed to "Emailed".

Click the **Send Confirmation(s)** button to send a confirmation email to one or more providers with a status of "Selected". This email can be sent any number of times; it does not change the status. Note that the system also provides for reminder email X days before the request and another reminder on the day of the request; these are configured on the Service Options page.

If the service request is cancelled, this button changes to **Send Cancellation(s)**, and the other buttons are grayed out, allowing you to send a cancellation email to the member and the selected service provider(s).

Click the **Send Not Needed(s)** button to send en email to every provider with a status of "Not Needed", notifying them that their services are not required for this

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request. Once the email has been sent, their status is changed to “Not Needed / Notified”.

The **Copy Service Request** button will be discussed separately below.

## Special Instructions

Use this field to enter special instructions or comments about the service request. This information is included in confirmation emails to the service provider and member. You can enter a maximum of 1000 characters and a counter will show how many characters are left.

If you have defined a Special Instructions additional member data question, and linked it to the Services module from the Service Options screen, the contents of this question will automatically be inserted in this field whenever a new service request is created.

## Payment

The Payment field is advisory only; it records who will be responsible for payments if any such are required.

## Followup Date

When you enter a date in this field, an open Contact Log entry is created to remind you to followup with the member. This entry is coded as “SR F/U” to indicate that it came from the Service Request function (versus one coded as “CL F/U” which indicates that it came from the Contact Log function.)

In the Contact Log, if you click **Edit** for a “SR F/U” entry, the Add/Edit Service Request form (Figure 3.18 above) is displayed.

## Service Request Status

For Village Scheduled services, there are five status values:

| | |
|---|---|
| Requested | The service is being set up but has not yet been linked to providers. This status is also used when village members make this request themselves through the system. See below for more information. |
| Pending | This service is still being set up and has now been linked to one or more service providers. |
| Confirmed | This service is confirmed with both the member and service provider. Only available for village-scheduled services. |

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| | |
|---|---|
| Completed | This service has been performed. This status may also confirm that the member has been contacted to provide followup comments and a rating. |
| Cancelled | This service was scheduled but the member later called to cancel. It stays in the database for reference purposes. (A full "Delete" option is also available on the main screen.)<br><br>When you select this option, a **Reason** field will appear, allowing you to select a reason for the cancellation.<br><br>In addition, when you select this option, the **Send Confirmation(s)** button changes to **Send Cancellations**, allowing you to send cancelation emails to the member and the selected service provider(s). |

When a service provider is selected and the service request is saved, the status will be changed automatically depending on which model is specified in the Service Options screen:

- If the initial status was "Requested", it will be changed to "Pending".
- If the initial status was "Pending", it will be changed to "Confirmed".

For Information Referrals, only Pending and Completed are available.

## Responsible Staffer

Select a responsible staffer from the drop-down list. This indicates who is responsible for following up with the member and volunteers, to ensure that someone handles the service request and to collect feedback after the fact.

This list is populated from the **Responsible Staffer** option on the main Services and Service Requests screen.

Click **Save** to save the service request and return to the Service Scheduler, or **Cancel** to return without saving.

## Completing a Service Request

When a service request status is changed to "Completed", a new **Ratings/Comments** option appears for each service provider listed in the grid (even the ones not selected!) Select this option to see the following screen:

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Add/Edit Ratings/Comments
Rate the service received by clicking on the stars (5 stars represent superior service).
You may also enter comments describing the experience, as well as expense information.
Service Details Dog Walker
Date 1/14/2013 at 11:20 AM
Provider Jim Monroe
Rating
Member Comments
Jim was very kind and helpful
Provider Comments
Mark needs a lot of assistance to navigate stairs. I can see that his mobility is getting worse.
Duration 30 minutes
Mileage 10
Expenses $ 4.00
Verified by Steve Cole
Save
Cancel

*Figure 3.24 – Completing a Service Request*

Ask the member to rate the service provided by this provider. Click the Rating stars to store this information. Each star can be clicked in full or half. You can also store any comments provided by the member and the service provider.

You should also verify the duration of the request with the provider, mileage driven for transportation services, and any direct expense incurred (tolls, parking, etc.) There are reports in the system to collect this information so that volunteers can claim tax deductions, and also to allow your village to report this time to donors and foundations. This information can be verified by a responsible staff member.

Click **Save** to save this information and return to the Add/Edit Service Request screen, or **Cancel** to return without saving.

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## Copy Service Request

When you click this button within a service request, you will see the following dialog:

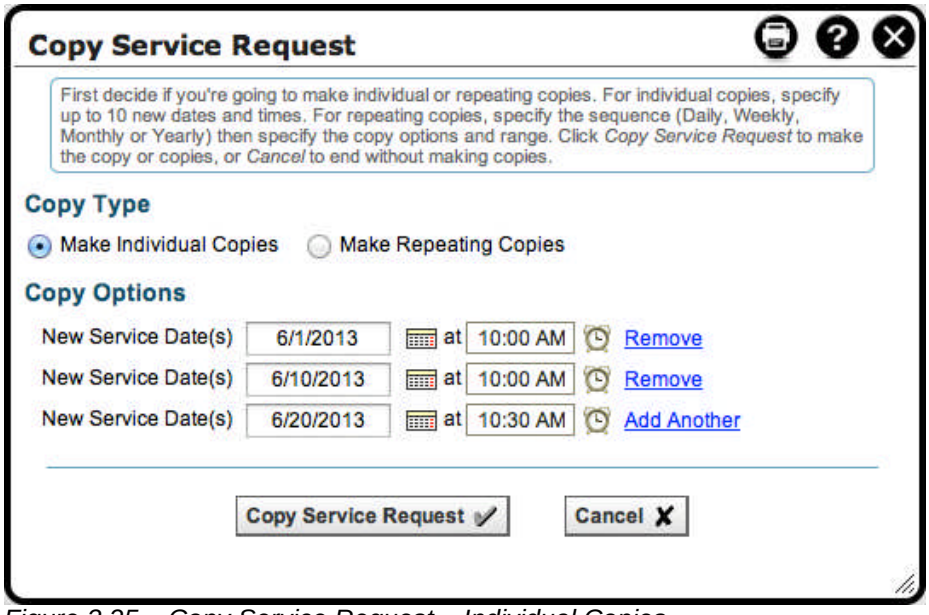
Copy Service Request
First decide if you're going to make individual or repeating copies. For individual copies, specify up to 10 new dates and times. For repeating copies, specify the sequence (Daily, Weekly, Monthly or Yearly) then specify the copy options and range. Click Copy Service Request to make the copy or copies, or Cancel to end without making copies.
Copy Type
Make Individual Copies
Make Repeating Copies
Copy Options
New Service Date(s) 6/1/2013 at 10:00 AM Remove
New Service Date(s) 6/10/2013 at 10:00 AM Remove
New Service Date(s) 6/20/2013 at 10:30 AM Add Another
Copy Service Request
Cancel

*Figure 3.25 – Copy Service Request – Individual Copies*

There are two options at the top of the screen: Make Individual Copies and Make Repeating Copies.

For the individual option, enter a date and time for the first copy. You can also click the calendar icon to select a date from a popup calendar and the clock icon to select a time from the drop-down list. You can then click **Add Another** to open a new set of fields for a second and third copies, all the way up to a maximum of 10 copies. You can also click the **Remove** link to remove an entry.

When you click **Copy Service Request**, the system will copy the original request to the dates and times specified.

**Important Note: these are now separate and independent service requests, not linked to the original request. If you need to make a change, it will need to be made separately on each request.**

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## Make Repeating Copies

When you select this option, you will see the following screen:

Copy Service Request
First decide if you're going to make individual or repeating copies. For individual copies, specify up to 10 new dates and times. For repeating copies, specify the sequence (Daily, Weekly, Monthly or Yearly) then specify the copy options and range. Click Copy Service Request to make the copy or copies, or Cancel to end without making copies.
Copy Type
Make Individual Copies
Make Repeating Copies
Daily
Weekly
Monthly
Yearly
Copy Options
New Service Date
5/10/2013
at
Every
2
day(s)
Every weekday
Copy Range
End after
10
occurences
End by
A maximum of 50 new service requests can be created.
Copy Service Request
Cancel

*Figure 3.26 – Copy a service request on a daily frequency*

Begin by specifying the copy frequency:

- Daily
- Weekly
- Monthly
- Yearly

and the new start date and time for the recurring copies. Then specify the options that pertain to the chosen frequency.

For **Daily** copies, you can copy the event every 1 to X days or on every weekday. For the Copy Range, specify a number of occurrences or the finish date. A maximum of 50 copies can be made. The example shows a request that's copied every two days for 10 occurrences.

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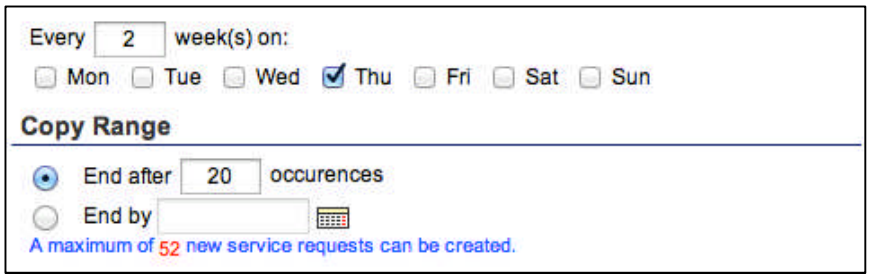
Every 2 week(s) on:
Mon Tue Wed Thu Fri Sat Sun
Copy Range
End after 20 occurences
End by
A maximum of 52 new service requests can be created.

*Figure 3.27 – Copy a service request on a weekly frequency*

For **Weekly** copies, you can copy the service request every X weeks, with individual control over which days of the week will receive the copies. For the Copy Range, specify a number of occurrences or the finish date. A maximum of 52 copies can be made. The example shows a service request that's copied every other Thursday for the next 38 weeks (20 times).

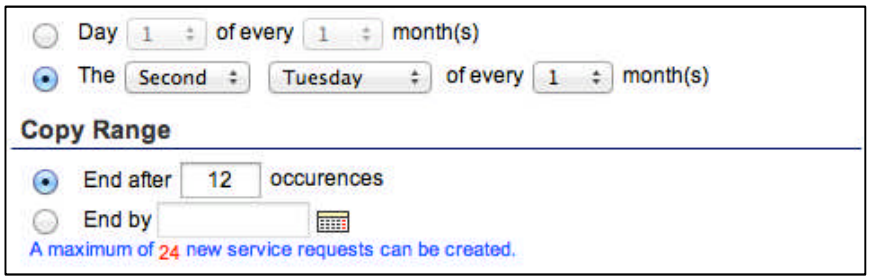
Day 1 of every 1 month(s)
The Second Tuesday of every 1 month(s)
Copy Range
End after 12 occurences
End by
A maximum of 24 new service requests can be created.

*Figure 3.28 – Copy a service request on a monthly frequency*

For **Monthly** copies, you can copy the service request to a specific day of the month and every X months. Or you can copy to the first, second, third, fourth or last day of the week of every X months. For the Copy Range, specify a number of occurrences or the finish date. A maximum of 24 copies can be made. The example shows a service request that's copied to the second Tuesday of the month for the next 12 months.

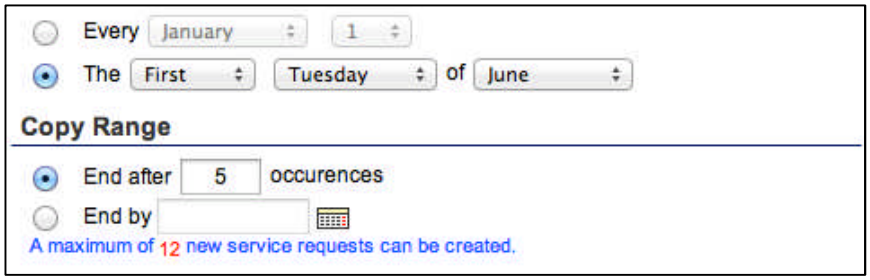
Every January 1
The First Tuesday of June
Copy Range
End after 5 occurences
End by
A maximum of 12 new service requests can be created.

*Figure 3.29 – Copy a service request on a yearly frequency*

For **Yearly** copies, you can copy the service request to a day of a specific month. Or you can copy to the first, second, third, fourth or last day of the week of a specific month. For the Copy Range, specify a number of occurrences or the finish date. A maximum of 12 copies can be made. The example shows an event that's copied to the first Sunday in June for the next 5 years.

Click **Copy Service Request** to initiate the copy.

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## *ADD OFFICE TIME REQUEST*

Many villages use volunteers to help with office functions, including check-in calls, filing, database updates, marketing programs, etc. ClubExpress can handle these for you as services provided by service providers.

### Setup

On the **Service Categories** screen, where you configure the categories into which services are grouped, create a service category for "Office Time" (it can be called anything.) Then, on the **Services** screen where you define the services that your village offers, create one or more services for office tasks, being sure to assign them to the Office Time category.

On the **Service Options** screen, specify which category will be used for office time. You should also specify a dummy member account to which all office time services will be assigned.

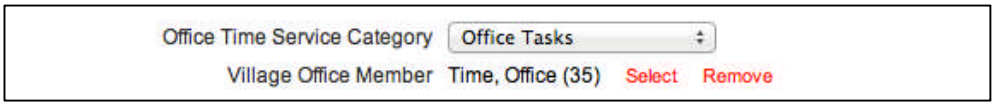


*Figure 3.30 – Service Options related to Office Time*

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## Add Request

Click **Add Office Time Request** and you will see the following screen:

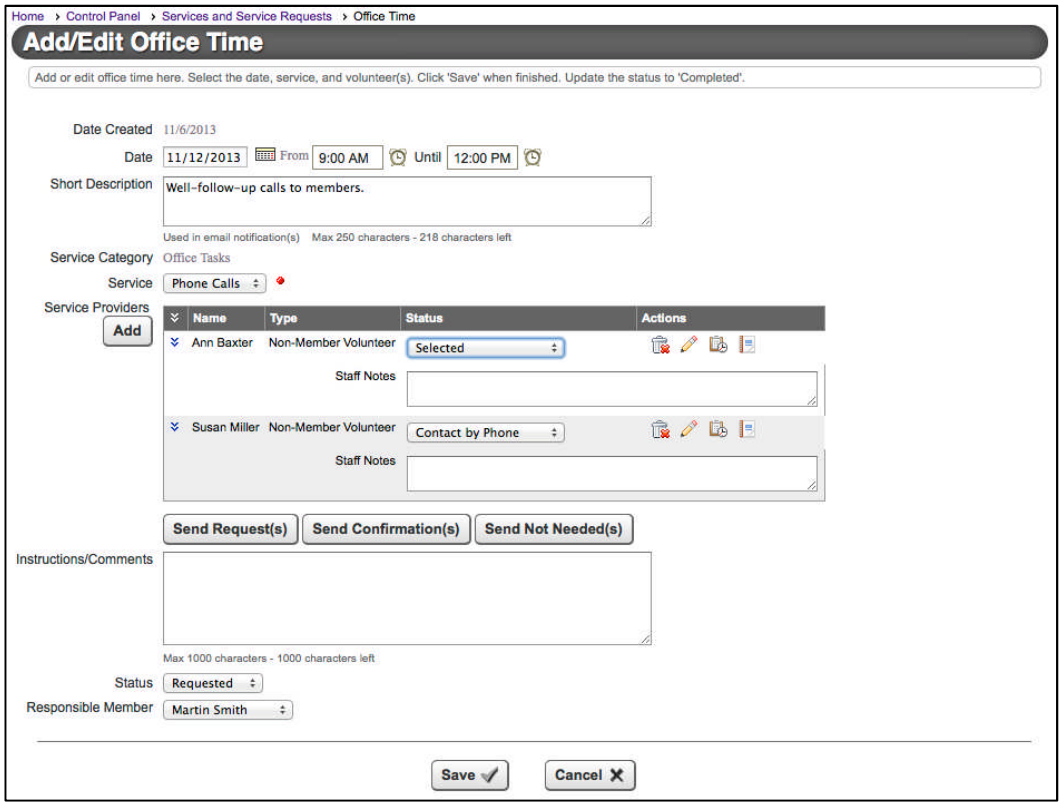
Home › Control Panel › Services and Service Requests › Office Time
Add/Edit Office Time
Add or edit office time here. Select the date, service, and volunteer(s). Click 'Save' when finished. Update the status to 'Completed'.
Date Created 11/6/2013
Date 11/12/2013 From 9:00 AM Until 12:00 PM
Short Description Well-follow-up calls to members.
Used in email notification(s) Max 250 characters - 218 characters left
Service Category Office Tasks
Service Phone Calls
Service Providers
Add
Name Type Status Actions
Ann Baxter Non-Member Volunteer Selected
Staff Notes
Susan Miller Non-Member Volunteer Contact by Phone
Staff Notes
Send Request(s) Send Confirmation(s) Send Not Needed(s)
Instructions/Comments
Max 1000 characters - 1000 characters left
Status Requested
Responsible Member Martin Smith
Save
Cancel

*Figure 3.31 – Add Office Time Request*

With office time requests, there is no need to specify a member since the request is automatically assigned to the dummy “Office Time” member that you already created. There is also no need to specify a category; the system automatically knows what services to display. But you will still pick a service from within this category.

Adding volunteers is the same as for a normal service request: click the **Add** button to display a list of volunteers who can provide this service; select one or more of them; contact them and adjust the provider status as necessary.

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The buttons below the list of service providers behave the same as with member service requests. Click the **Send Request(s)** button to email volunteers asking if they can help with this office time request. Click the **Send Confirmation(s)** button to email volunteers who have been confirmed for this request. Click the **Send Not Needed(s)** button to email anyone listed as Not Needed. And click the **Copy Service Request** button to make one or more copies of this office time request.

When you click **Save**, the office time request is saved. These entries will be shown on the main Service Requests grid; you can hide them by unchecking the Office Time service category on the left side panel.

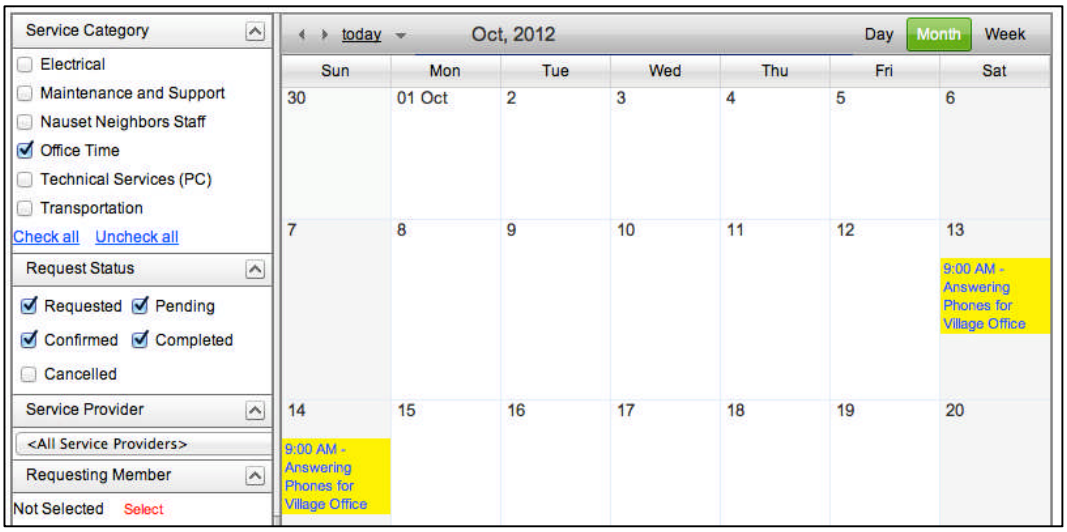


*Figure 3.32 – Office Time Requests in the Grid*

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## OPEN PROVIDER REQUESTS

When a service provider calls to follow up on a phone call or email he or she received, ClubExpress provides a way to quickly find the open service request about which the provider is calling.

Select **Open Provider Requests** to view open service requests (those having a status of Requested, Pending, or Confirmed.) You will see a screen similar to the following:

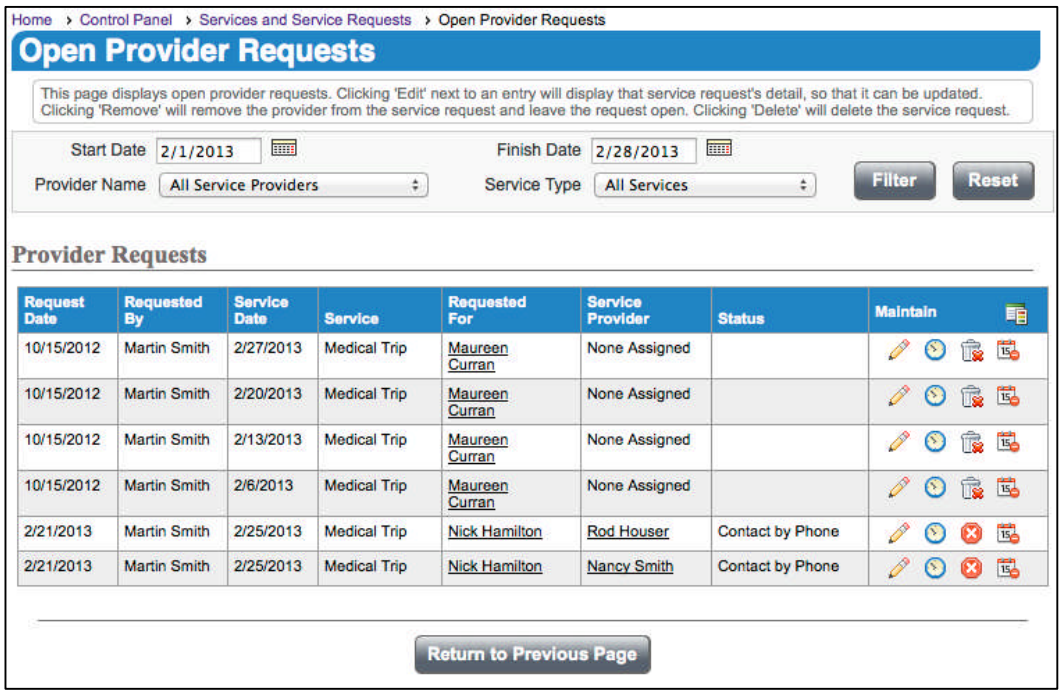
Home › Control Panel › Services and Service Requests › Open Provider Requests
Open Provider Requests
This page displays open provider requests. Clicking 'Edit' next to an entry will display that service request's detail, so that it can be updated. Clicking 'Remove' will remove the provider from the service request and leave the request open. Clicking 'Delete' will delete the service request.
Start Date 2/1/2013
Finish Date 2/28/2013
Provider Name All Service Providers
Service Type All Services
Filter
Reset
Provider Requests
Request Date | Requested By | Service Date | Service | Requested For | Service Provider | Status | Maintain
10/15/2012 | Martin Smith | 2/27/2013 | Medical Trip | Maureen Curran | None Assigned
10/15/2012 | Martin Smith | 2/20/2013 | Medical Trip | Maureen Curran | None Assigned
10/15/2012 | Martin Smith | 2/13/2013 | Medical Trip | Maureen Curran | None Assigned
10/15/2012 | Martin Smith | 2/6/2013 | Medical Trip | Maureen Curran | None Assigned
2/21/2013 | Martin Smith | 2/25/2013 | Medical Trip | Nick Hamilton | Rod Houser | Contact by Phone
2/21/2013 | Martin Smith | 2/25/2013 | Medical Trip | Nick Hamilton | Nancy Smith | Contact by Phone
Return to Previous Page

*Figure 3.33 – Open Provider Requests*

The most common use of this screen will be to filter based on a Provider Name (and optionally on a date range and service type.) When you click the **Filter** button, the system will show all matching open service requests, with one row for each provider linked to the request. A single service request may be listed multiple times, once for each provider linked to the request.

Click the **Edit** icon to edit the service request. Click the **Remove** icon to remove just that provider from the request. Click the **Availability** icon to adjust this provider's overall availability, and the **Not Available** icon to adjust this provider's dates not available. These screens are described above.

If you see a row without a provider listed, this represents an open service requests with no one currently linked to it. Click the **Edit** icon to edit this request and the **Delete** icon to remove the request completely.

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## *SERVICE REQUESTS WITHOUT A DATE*

ClubExpress allows a service request to be created and saved without a date. This is necessary if you need to match the member's need with the times when a service provider is available (some requests, such as a visit to the grocery store, can be performed at different times.)

Service Requests without a date will not appear on the main Service Request calendar. To view these requests, select this option. You will see a screen similar to the following:

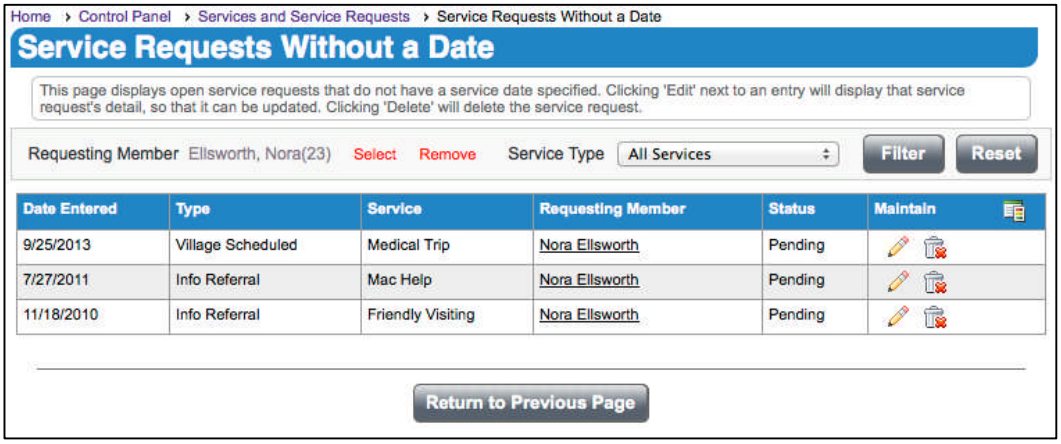


*Figure 3.34 – Service Requests Without a Date*

You can optionally filter by Requesting Member and/or Service Type. Click the **Filter** button to apply a filter and the **Reset** button to clear the filter.

The system will show all matching service requests without a date. Click the **Edit** link to edit the service request. Click the **Delete** link to delete the service request. Once a date has been assigned to a service request, it will disappear from this display and be shown instead on the main services calendar.

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## *To-Do List*

Click the **To-Do List** link to see a screen showing open Contact Log and Service Request items. You will see a screen similar to the following:

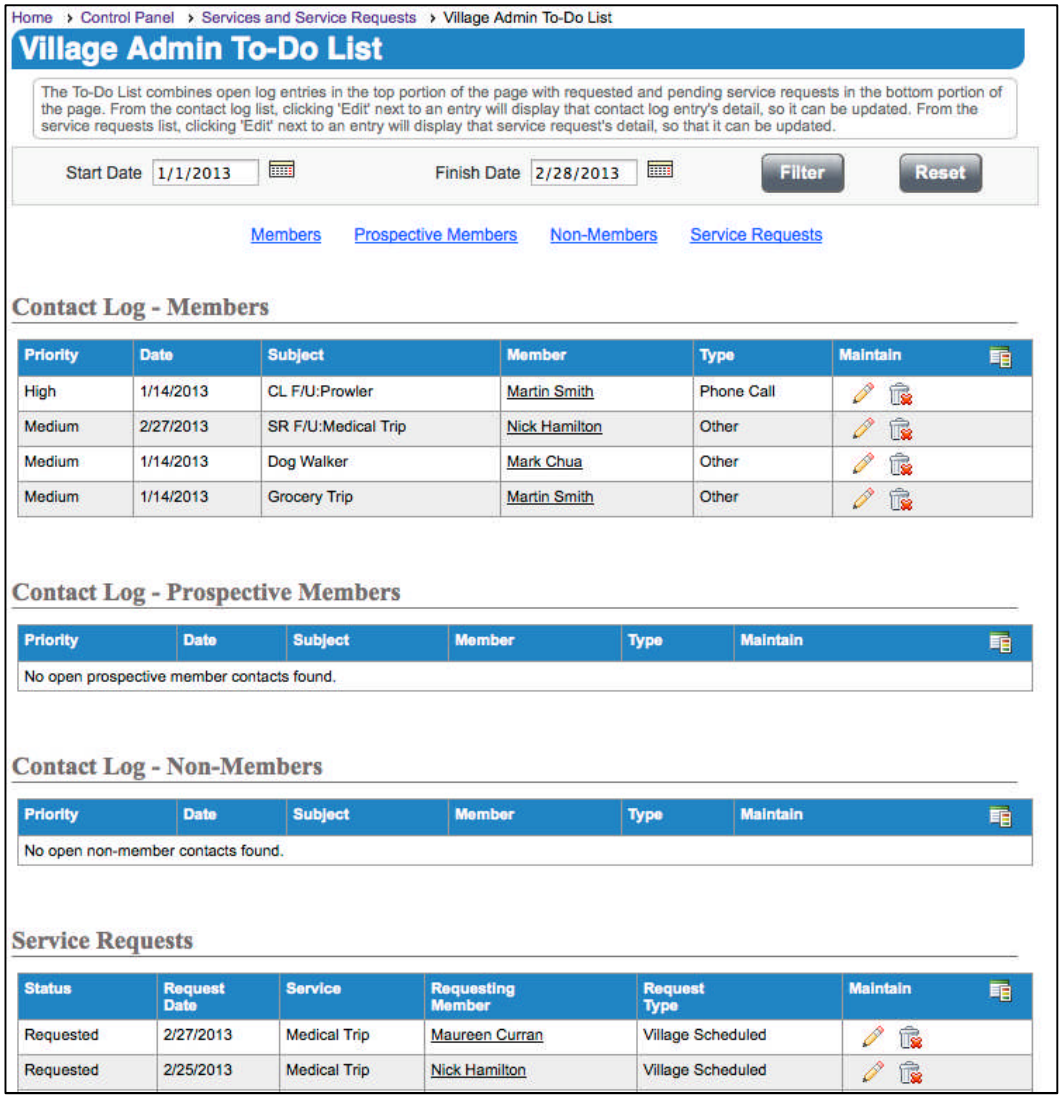
Home › Control Panel › Services and Service Requests › Village Admin To-Do List
Village Admin To-Do List
The To-Do List combines open log entries in the top portion of the page with requested and pending service requests in the bottom portion of the page. From the contact log list, clicking 'Edit' next to an entry will display that contact log entry's detail, so it can be updated. From the service requests list, clicking 'Edit' next to an entry will display that service request's detail, so that it can be updated.
Start Date 1/1/2013
Finish Date 2/28/2013
Filter
Reset
Members
Prospective Members
Non-Members
Service Requests
Contact Log - Members
Priority | Date | Subject | Member | Type | Maintain
High | 1/14/2013 | CL F/U:Prowler | Martin Smith | Phone Call
Medium | 2/27/2013 | SR F/U:Medical Trip | Nick Hamilton | Other
Medium | 1/14/2013 | Dog Walker | Mark Chua | Other
Medium | 1/14/2013 | Grocery Trip | Martin Smith | Other
Contact Log - Prospective Members
Priority | Date | Subject | Member | Type | Maintain
No open prospective member contacts found.
Contact Log - Non-Members
Priority | Date | Subject | Member | Type | Maintain
No open non-member contacts found.
Service Requests
Status | Request Date | Service | Requesting Member | Request Type | Maintain
Requested | 2/27/2013 | Medical Trip | Maureen Curran | Village Scheduled
Requested | 2/25/2013 | Medical Trip | Nick Hamilton | Village Scheduled

*Figure 3.35 – To-Do List*

The To-Do List can optionally be filtered by a date range. Click the **Filter** button to apply the filter and the **Reset** button to clear the filter. This screen shows items in four grids:

Contact Log – Members
Contact Log – Prospective Members
Contact Log – Non-Members
Service Requests

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Some of these grids will get quite long. Use the links at the top to jump to each of the four grids. The contact log grids are organized by Priority (Urgent, High, Medium, and Low.) The Service Request grid is organized by date and then status.

The Contact Log grids will show three types of entries:

An original Contact Log Entry. When you click the **Edit** icon, the original Contact Log entry is displayed.

CL F/U as a Subject prefix – Followup from a Contact Log Entry. When you click the **Edit** icon, a new contact log entry will be displayed for the followup contact.

SR F/U as a Subject prefix – Followup from a Service Request. When you click the **Edit** icon, the original service request entry will be displayed. You will most often use this option after the service date to get ratings and comments from the member and service provider(s).

If you change a Contact Log entry status to Closed, it will be removed form the list.

The Service Requests grid will only show requested and pending service requests. When you click the **Edit** icon, the original service request entry is displayed. If you change the status to Confirmed, Completed or Cancelled, it will be removed from the list.

Click the **Delete** icon to remove a contact log or service request entry.

Click **Return to Previous Page** to return to the main Service Requests screen.

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## REPORTS

Click the **Service Reports** link to display a standard ClubExpress reports dialog, showing more than 20 reports available for services data. Each report can be filtered by date range and other criteria, and can then be output in one of five different formats.

## EXPORTS

Click the **Exports** link to display a list of data exports.

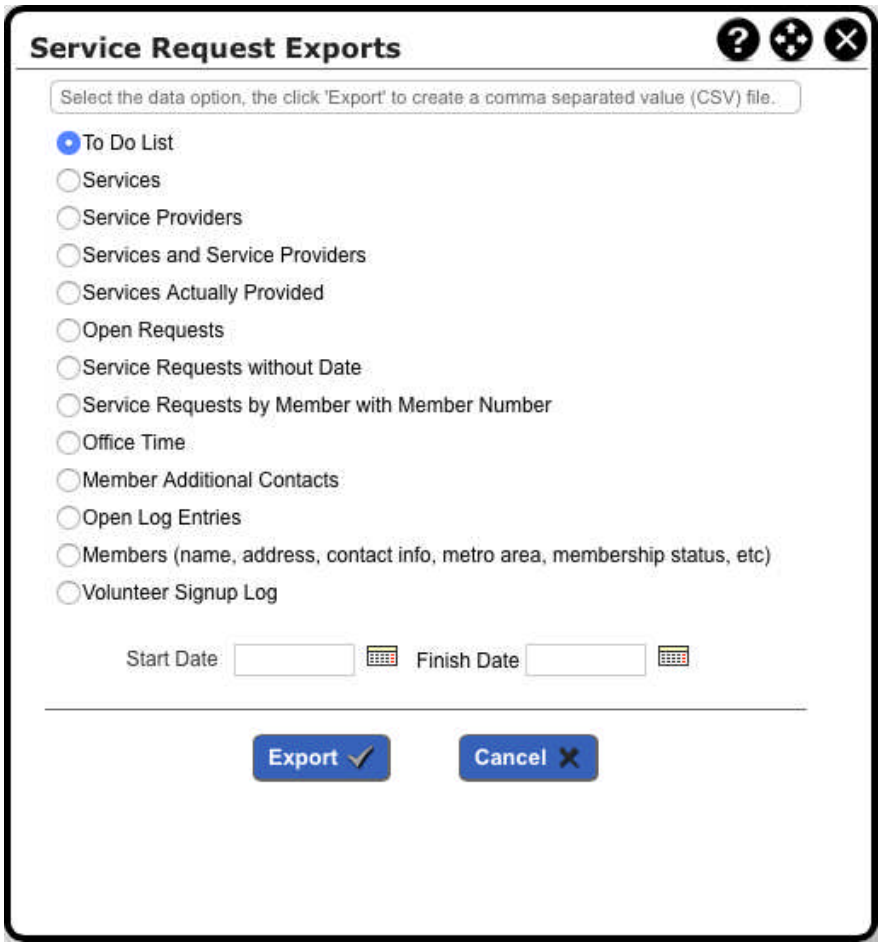


*Figure 3.36 – Service Request Exports*

Select an export and optionally specify a date range, then click the **Export** button to save the export file to your local computer in CSV (Comma Separated Values) format, which can be opened directly in Excel, Access and many other programs. Use this option to copy service information down to your local computer for more detailed analysis and reporting.

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## *MEMBER PROFILE – MY SERVICE REQUESTS*

When the Services function is enabled, members also have a special option in their **Profile** screen – **My Service Requests**. Clicking this option displays a screen similar to the following:

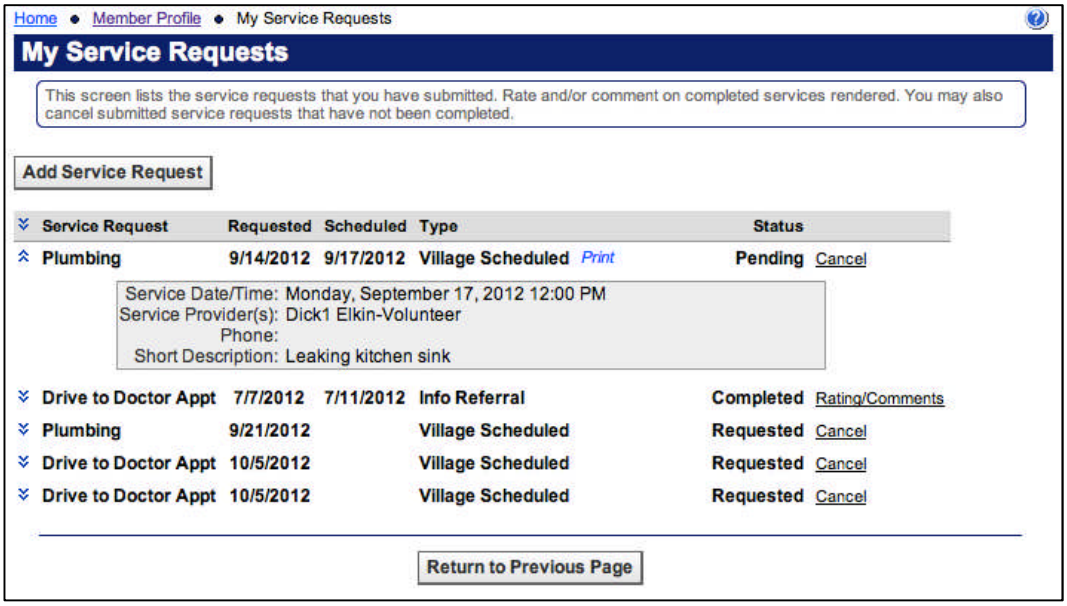
Home • Member Profile • My Service Requests
My Service Requests
This screen lists the service requests that you have submitted. Rate and/or comment on completed services rendered. You may also cancel submitted service requests that have not been completed.
Add Service Request
Service Request Requested Scheduled Type Status
Plumbing 9/14/2012 9/17/2012 Village Scheduled Print Pending Cancel
Service Date/Time: Monday, September 17, 2012 12:00 PM
Service Provider(s): Dick1 Elkin-Volunteer
Phone:
Short Description: Leaking kitchen sink
Drive to Doctor Appt 7/7/2012 7/11/2012 Info Referral Completed Rating/Comments
Plumbing 9/21/2012 Village Scheduled Requested Cancel
Drive to Doctor Appt 10/5/2012 Village Scheduled Requested Cancel
Drive to Doctor Appt 10/5/2012 Village Scheduled Requested Cancel
Return to Previous Page

*Figure 3.37 – Profile – Service Request History*

For each service request, the system shows the request type, date and status. Click the double-down arrow beside each entry to display more information.

Click the **Rating/Comments** link to specify a rating and make comments. This option is only available for Completed requests. The following screen is displayed:

Add Rating/Comments
Rate the service you received here by clicking on the stars (5 stars represents superior service). You may also enter comments describing your experience.
Service Details Grocery Trip
Date 1/14/2013 10:00:00 AM
Provider Susan Miller
Rating
The lowest rating is half a star; No stars is considered 'not rated'.
Enter Comments
Susan was very kind and helpful
Save
Cancel

*Figure 3.38 – Add Rating/Comments*

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Members can click the rating stars to record a rating, and enter comments. They will click **Save** to save their changes and return to the Profile screen, or **Cancel** to return without saving.

## Add Service Request

Instead of making a phone call, members can also initiate their own service requests through the system. Members do not pick a service provider; that responsibility remains with the village office. But they can request a specific service around an approximate time. Clicking the **Add Service Request** button displays the following screen:

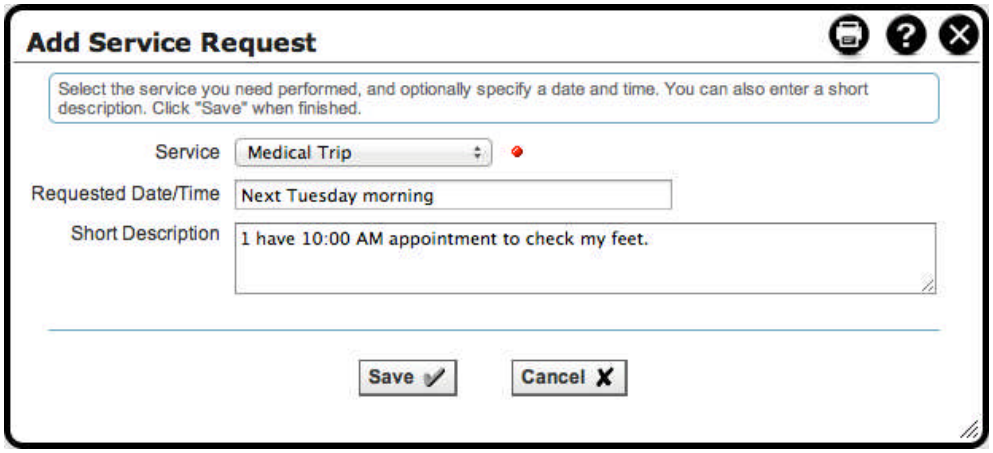
Add Service Request
Select the service you need performed, and optionally specify a date and time. You can also enter a short description. Click "Save" when finished.
Service
Medical Trip
Requested Date/Time
Next Tuesday morning
Short Description
1 have 10:00 AM appointment to check my feet.
Save
Cancel

*Figure 3.39 – Add Service Request by member*

The member will select a service from the drop-down list and request date and time. They can also enter comments or more detailed instructions. When they click **Save**, the service is saved with a "Requested" status and it's immediately visible to the village's admins. Requested services are *not* confirmed because the village still needs to screen the request and assign a service provider.

When this request is opened by an administrator, the requested date appears as read-only text above the actual date and time fields, allowing the village staff member to work with the member and service providers to arrive at a final date and time.

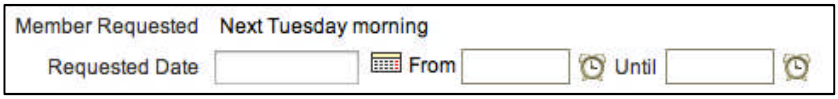


*Figure 3.40 – Specifying the Actual Date/Time*

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## *EMAILING ENHANCEMENTS*

When this Member Services module is enabled for a village, two options are also added to the ClubExpress bulk emailing function. You can include the following options when building a distribution list for an emailing:

- Member Volunteers – fully vetted and visible only
- Non- Member Volunteers – fully vetted and visible only

For more information on sending bulk emails to members and non-members, see Chapter 18 in the main Administrator Manual.

## *SYSTEM EMAILING ENHANCEMENTS*

The Services and Service Requests module sends out a number of emails to members and volunteers. Many of these emails can be customized by going to the Control Panel – Communications tab – Setup section – System Emails option. When you edit any of these emails, there is an extensive list of fields related to service requests that can be added to each email. For more information, see Chapter 19 of the main ClubExpress Administrator Manual.

## *AN IMPORTANT NOTE ABOUT SESSIONS*

Some villages have come up with the bright idea of opening multiple windows or tabs in their browser and pointing each window or tab to their website, then logging in and going to the Member Services function so that they can manage two or more service requests at the same time.

This is NOT recommended. Opening a new tab or window in your browser does not necessarily create a new session that is separate and distinct from the current session. If you are managing separate service requests in each window, the service provides will become intermingled and possibly corrupted.

The most recent versions of every major browser have a special option that forces a separate session to be created:

- Microsoft Internet Explorer: **File – New Session**
- Google Chrome: **File – New Incognito Window**
- Mozilla Firefox: **File – New Private Window**
- Apple Safari: **File – New Private Window**

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# Chapter 4 – Hub-and-Spoke Functionality

## *INTRODUCTION*

ClubExpress provides special functionality for villages that are organized around a "Hub-and-Spoke" model, with a central office that handles all village operations, and satellite villages that operate locally, including their own members, volunteers, and contractors.

Some Hub-and-Spoke villages serve a large area (for example, a county that could be 20-30 miles across) while others serve a much smaller area (for example, a collection of neighborhoods within a town or community.)

But in each case, members join at the "hub" or central village level. There is one website, one set of member types, and one office where all service requests and member contacts are handled.

Hub-and-Spoke functionality allows each member, volunteer, and contractor to be assigned to a "spoke" or local community or neighborhood. These are called "Metro Areas" in the ClubExpress lexicon. Then, the main services calendar can be filtered by metro area and when a service request is created, the list of available volunteers or contractors can be also be filtered by metro area to ensure that only volunteers or contractors who are geographically close to the member will be contacted. However, you also have the option to search for and link volunteers or contractors who may be a little further away (for example, the "next town over".)

Non-"Hub-and-Spoke" villages that just want to track the neighborhood where a member lives, within the larger service area of the village, can also use this functionality.

## *ENABLING HUB-AND-SPOKE FUNCTIONALITY*

In the Member Services function, select **Service Options**. Near the bottom of the screen, you will see a check box to Enable Hub-and-Spoke Functionality. Check this box and click **Save.**

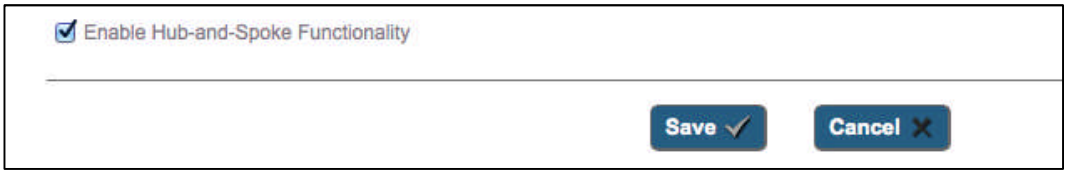


*Figure 4.1 – Enable Hub-and-Spoke Functionality*

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## CONFIGURING METRO AREAS

When this option is enabled, a new link appears in the **Configure** box for Services and Service Requests:

*Figure 4.2 – Configure options*

Select **Metro Areas** to see a screen similar to the following:

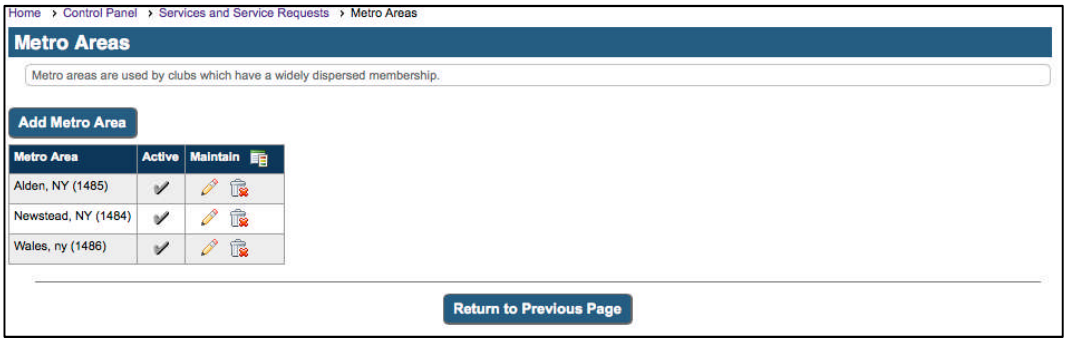
Home › Control Panel › Services and Service Requests › Metro Areas
Metro Areas
Metro areas are used by clubs which have a widely dispersed membership.
Add Metro Area
Metro Area
Active
Maintain
Alden, NY (1485)
Newstead, NY (1484)
Wales, ny (1486)
Return to Previous Page

*Figure 4.3 – Metro Areas*

This is a list of Metro Areas. It's a standard ClubExpress admin grid, with an **Add Metro Area** button, as well as **Edit** and **Delete** links. Clicking the Add button displays the following dialog:

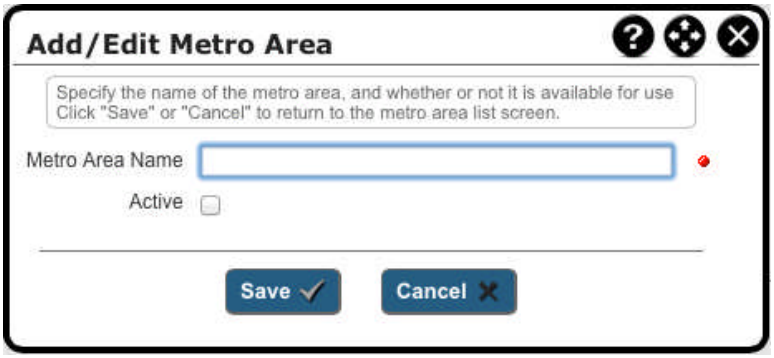
Add/Edit Metro Area
Specify the name of the metro area, and whether or not it is available for use
Click "Save" or "Cancel" to return to the metro area list screen.
Metro Area Name
Active
Save
Cancel

*Figure 4.4 – Add/Edit Metro Area*

Enter a metro area and specify whether it's currently Active. You can use this option to disable a "spoke" village temporarily. Click **Save** to save your changes and return to the main grid or **Cancel** to return without saving.

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## *ASSIGNING PEOPLE TO A METRO AREA*

ClubExpress allows you to assign members, non-member volunteers, and contractors to a metro area.

You can access these screens in different ways:

- For members, go to the Member Manager, search for a member, then click **Profile – Contact Info**.
- For non-members, go to the Non-Member Database, search for a non-member, then click Maintain - Edit
- For both members and non-members (volunteers and contractors), go to Member Services, then click the Service Providers option. Search for a service provider then click the **Edit** (pencil) icon.

In each case, you will see a screen allowing you to update basic contact information. The address panel will look similar to the following:

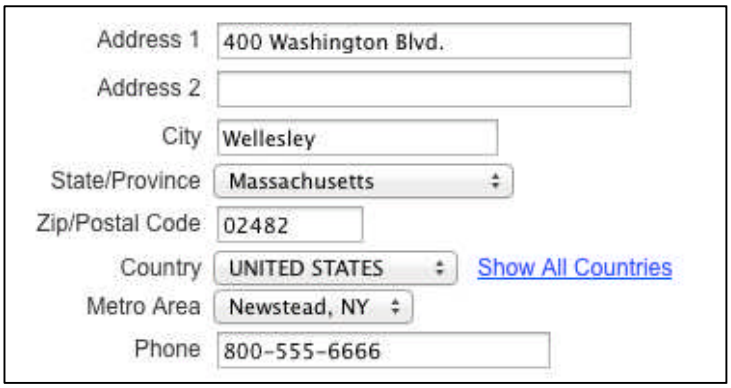


*Figure 4.5 – Assigning a Member or Non-Member to a Metro Area*

Select a metro area from the drop-down list and click **Save** to save your changes and return to the previous screen, or **Cancel** to cancel without saving.

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## MANAGING SERVICE REQUESTS

When you add or edit a service request, Metro Areas will be displayed and used in a number of places.

When you select the member for whom the service request is being defined, his or her metro area will be displayed:

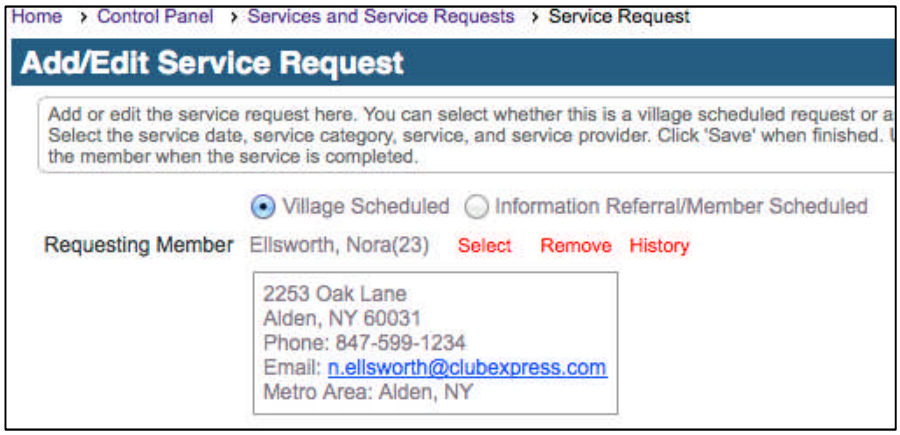
Home › Control Panel › Services and Service Requests › Service Request
Add/Edit Service Request
Add or edit the service request here. You can select whether this is a village scheduled request or a
Select the service date, service category, service, and service provider. Click 'Save' when finished.
the member when the service is completed.
Village Scheduled
Information Referral/Member Scheduled
Requesting Member
Ellsworth, Nora(23)
Select
Remove
History
2253 Oak Lane
Alden, NY 60031
Phone: 847-599-1234
Email: n.ellsworth@clubexpress.com
Metro Area: Alden, NY

*Figure 4.6 – Add/Edit Service Request*

When you click the **Add** button to add service providers to a request, the **Service Providers** popup screen now includes a Metro Area filter.

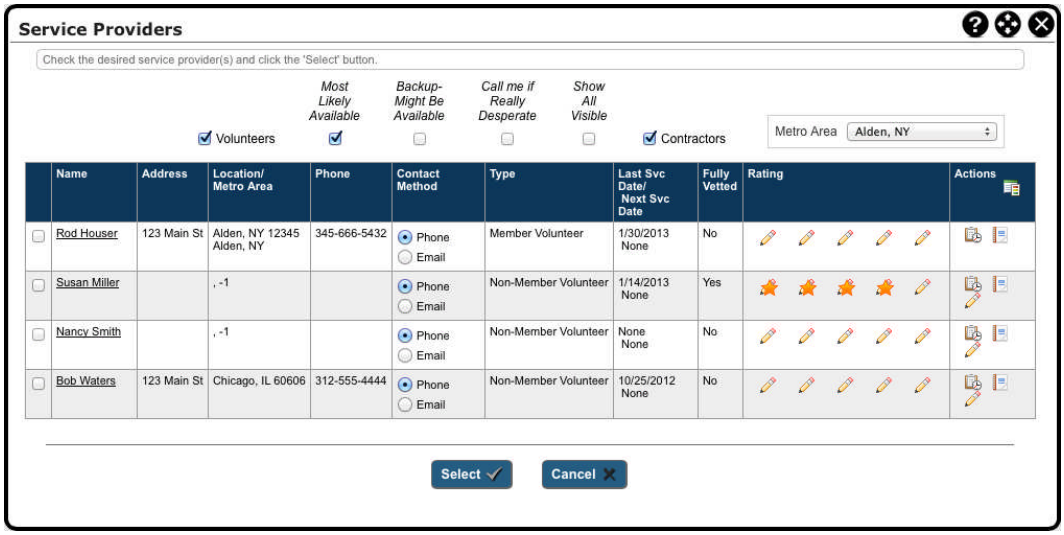


*Figure 4.7 – Select Service Providers*

The system will initially show the member's Metro Area and any service providers linked to that metro area (as well as service providers with no assigned metro area. If you don't find a match, you can select a different metro area (perhaps one immediately adjacent) to find additional matches.

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And when you link one or more service providers to a request, the metro area is shown with each service provider:

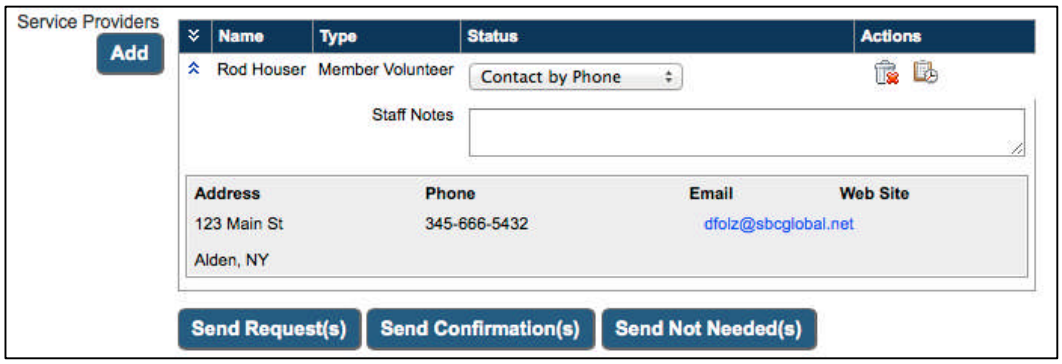


*Figure 4.8 – Link Service Provider to request*

## Service Request Calendar

The main Service Request Calendar can also be filtered by Metro Area, to show only those requests in a specific "spoke" village.

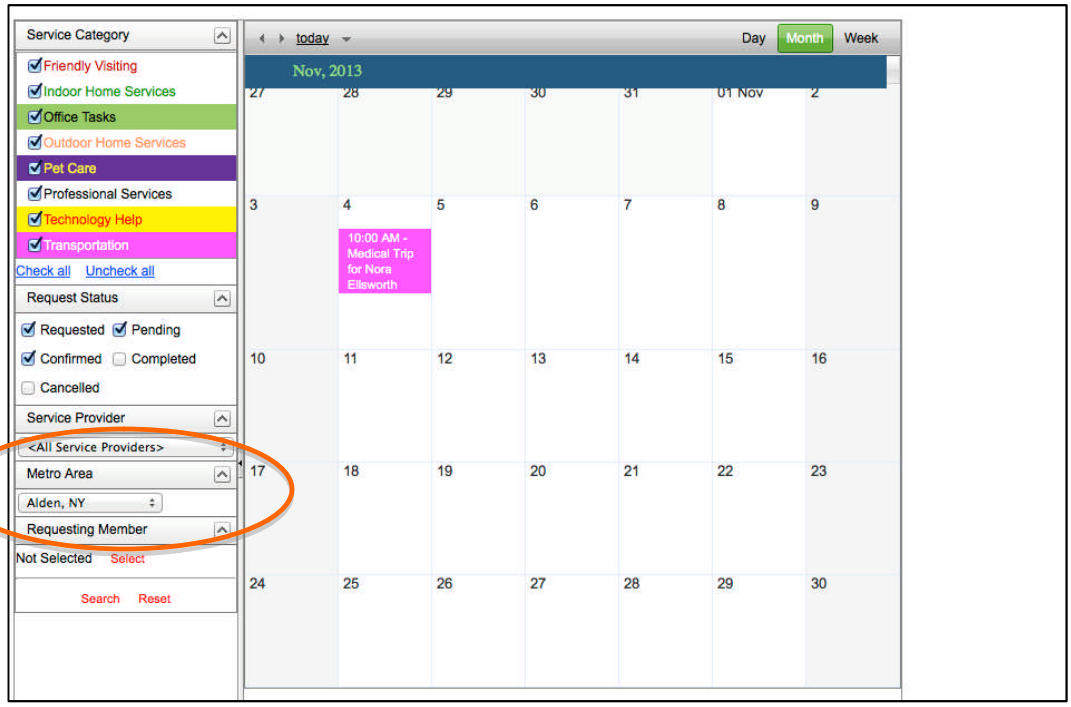


*Figure 4.9 – Filtering service requests by Metro Area*

## Reports and Exports

Metro area has been added to a number of reports and data exports.

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# Chapter 5 – Member Additional Contacts

## *INTRODUCTION*

An important function for villages is to track additional contacts for a member, so that village staff members know who to contact in the event of an emergency or questions about a member. Additional contacts include family members, medical and legal advisors, social workers and others who protect and look out for the member.

To access a member's additional contacts, go to **Control Panel – Member Manager** and search for the member. Click the Profile link in the Maintain column beside the member's name, then select Additional Contacts from the Personal Info section. You will see a screen similar to the following:

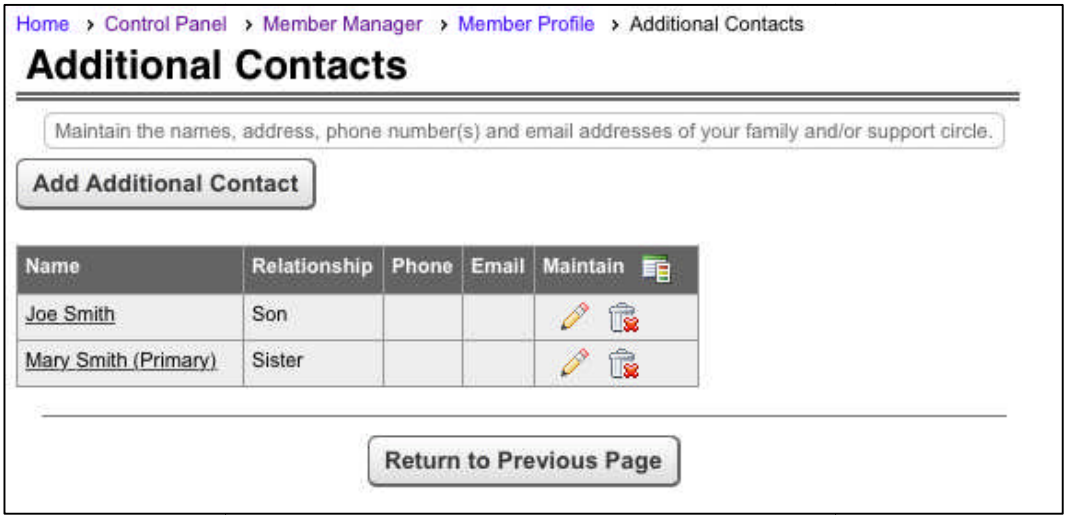


*Figure 5.1 – Additional Contacts for a member*

For each additional contact, the system shows the name, relationship, phone and email. The "primary" contact is also flagged. You can click the name to see more information such as their address. Click the standard **Edit** icon to modify information on an additional contact, or the standard **Delete** icon to remove an additional contact.

### Add Additional Contact

Click the **Add Additional Contact** button to add a contact for a member. You will see the following screen:

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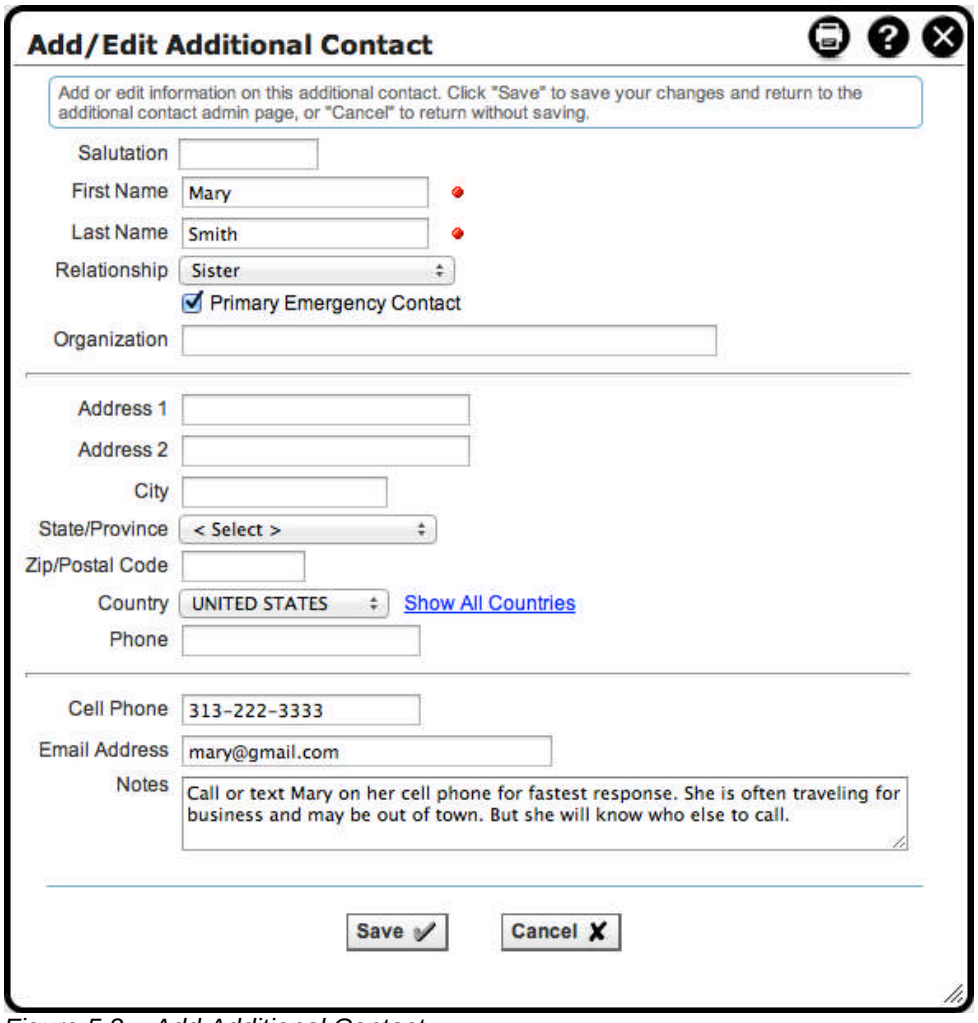


*Figure 5.2 – Add Additional Contact*

Only the first name, last name and relationship are required but we strongly encourage you to complete as much information as possible to make each additional contact entry as useful as possible.

Check the “Primary Emergency Contact” box to flag one person to be called in the event of an emergency.

The Relationship options are defined by ClubExpress. You should see every relationship you will need but if you need something added to the list, contact ClubExpress.

Click **Save** to save the new additional contact and return to the list screen, or **Cancel** to return without saving.

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# Chapter 6 – Find a Village Contractor

## *INTRODUCTION*

Some villages prefer that all contractor requests go through the village office so that village staff members can followup with members to make sure everything was satisfactory. Other villages allow members to look up contractors on their own, from among the list of vetted contractors in each service. This module handles this need.

## *FIND A VILLAGE CONTRACTOR*

This function can be found on the Control Panel – Communications tab. It is a standard module so it can easily be added to the members menu, available to be selected at any time.

There is no admin side to the function, just a user side. So clicking the **Edit** (pencil) or **View** (eye) icons display the same screen, shown below:

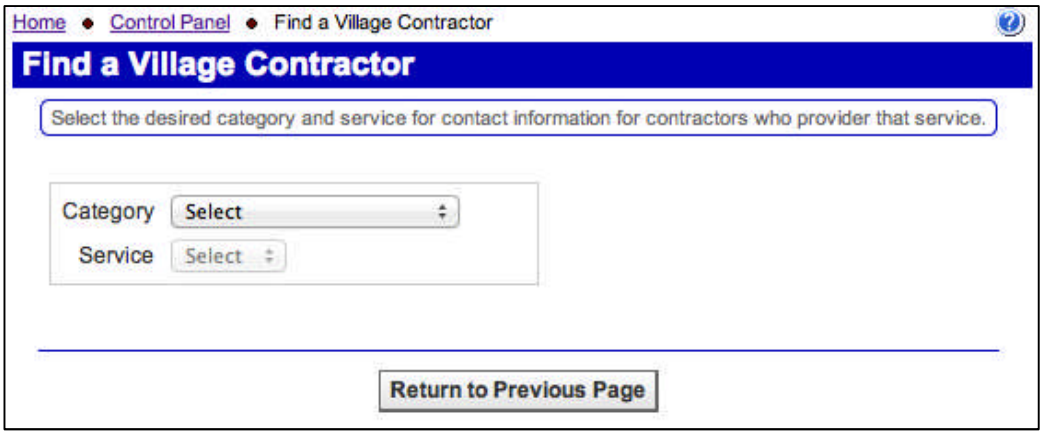
Home • Control Panel • Find a Village Contractor
Find a Village Contractor
Select the desired category and service for contact information for contractors who provider that service.
Category
Select
Service
Select
Return to Previous Page

*Figure 6.1 – Find a Village Contractor*

Select a Service Category and the Service list will refresh to show just services in that category. Select a service and the lower part of the screen will refresh to show contractors who provide that service, as shown below:

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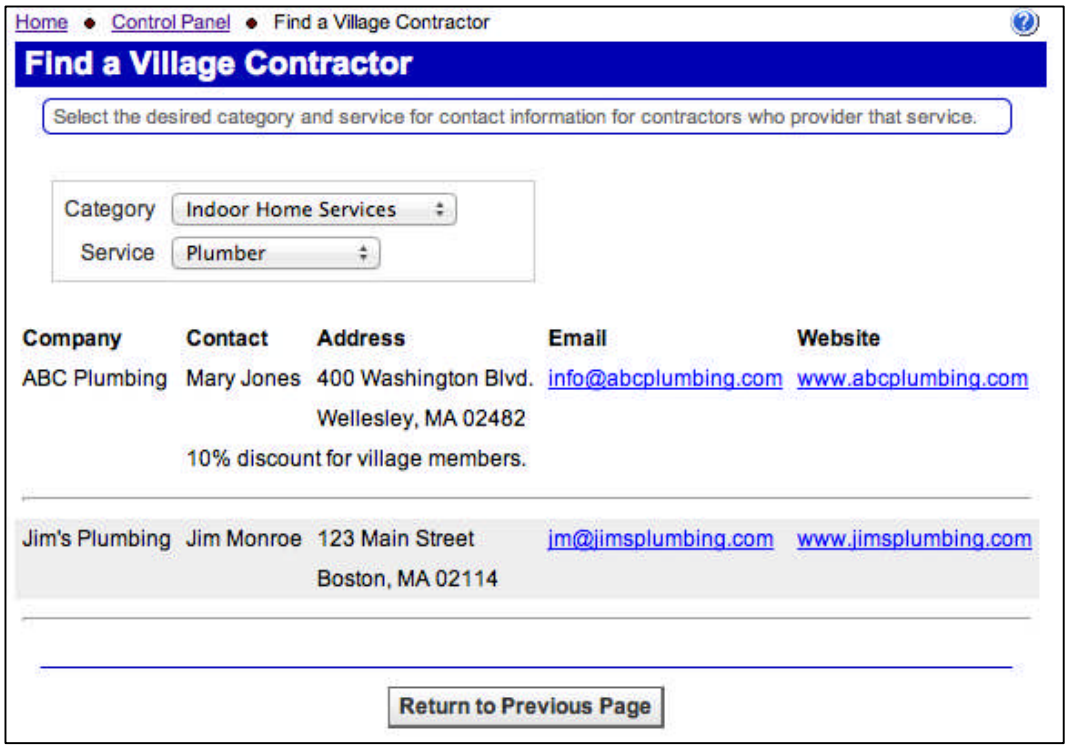
Home • Control Panel • Find a Village Contractor
Find a Village Contractor
Select the desired category and service for contact information for contractors who provider that service.
Category Indoor Home Services
Service Plumber
Company Contact Address Email Website
ABC Plumbing Mary Jones 400 Washington Blvd. Wellesley, MA 02482 info@abcplumbing.com www.abcplumbing.com
10% discount for village members.
Jim's Plumbing Jim Monroe 123 Main Street Boston, MA 02114 jm@jimsplumbing.com www.jimsplumbing.com
Return to Previous Page

*Figure 6.2 – Find a Village Contractor - Results*

Contractors are shown with the company name and a contact person, address, phone numbers, email address and website. If the contractor provides special discounts or programs for village members, these are also shown.

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# Chapter 7 – Volunteer Self Signup – $

## *INTRODUCTION*

This function allows your volunteers to assign themselves for services requested by members. Many villages are comfortable allowing certain types of services to be self selected by certain volunteers, without the village office and staff being involved.

**Important Note**

This function was developed under a unique model: one village paid for it to be built. If other villages want to use it, there is a one-time fee of $600. Half of this fee is remitted back to the original village to reimburse them for their initial investment, while the other half is retained by ClubExpress to cover our time to convert the function for use by another village.

And please note that this option is available for any kind of customization. If your village needs a special function and you think that other villages might also be interested, we can build this function for you, for a fee, then make it available to other villages for a fee that is then partly remitted back to you to reimburse you for initially sponsoring the development cost. Who knows: if enough other villages are interested, you end up getting the feature for free.

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## *FOR NON-MEMBER VOLUNTEERS*

Non-member volunteers who are fully vetted can be provided with a username and password to login just to the Volunteer Self-Signup screen. On the **Service Providers** screen, click the "gear with key" icon to send them a new username and password.

They will then use the following link to login:

http://www.myvillage.org/volunteerrequests

Use your village's actual domain name or ClubExpress name in place of "www.myvillage.org" in the above URL. Note that the regular **Member Login** link will not work for non-member volunteers.

A special login screen is displayed prompting for the non-member's username and password. This screen has a "Remember Me" option so that non-member volunteers can login on a trusted computer without having to enter their username and password each time. It also has a Forgot My Username/Password option and a separate link to redirect members to the correct login page for them. (Similarly, the standard member login screen has a link to redirect non-member volunteers to this screen for their special login.)

Once this information has been entered successfully, non-members will see a screen similar to the following (but hopefully with many more open requests!):

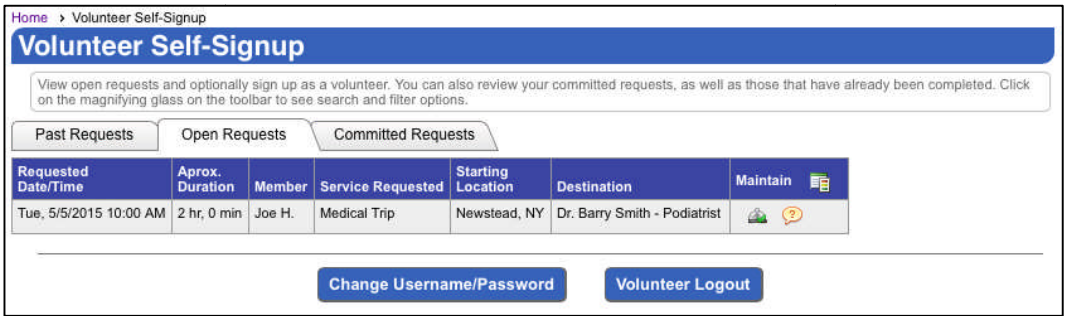
Home › Volunteer Self-Signup
Volunteer Self-Signup
View open requests and optionally sign up as a volunteer. You can also review your committed requests, as well as those that have already been completed. Click on the magnifying glass on the toolbar to see search and filter options.
Past Requests
Open Requests
Committed Requests
Requested Date/Time
Aprox. Duration
Member
Service Requested
Starting Location
Destination
Maintain
Tue, 5/5/2015 10:00 AM
2 hr, 0 min
Joe H.
Medical Trip
Newstead, NY
Dr. Barry Smith - Podiatrist
Change Username/Password
Volunteer Logout

*Figure 7.1 – Volunteer Self-Signup screen*

The default view is Open Requests, showing those service requests waiting to be filled. For each service request, volunteers can see the requested date and time, the approximate duration, the member making the request, the general service requested, and the starting location and destination. For hub-and-spoke villages, the starting location will normally show the metro area.

At the bottom of the screen are buttons that allow volunteers to change their username and password, and to logout.

Volunteers can click the **Request Description** (voice balloon) icon in the last column to see the request's Short Description in a small popup. To see more details about the request and to sign up to handle this request, they will click the **View/Select** icon to see a popup dialog similar to the following:

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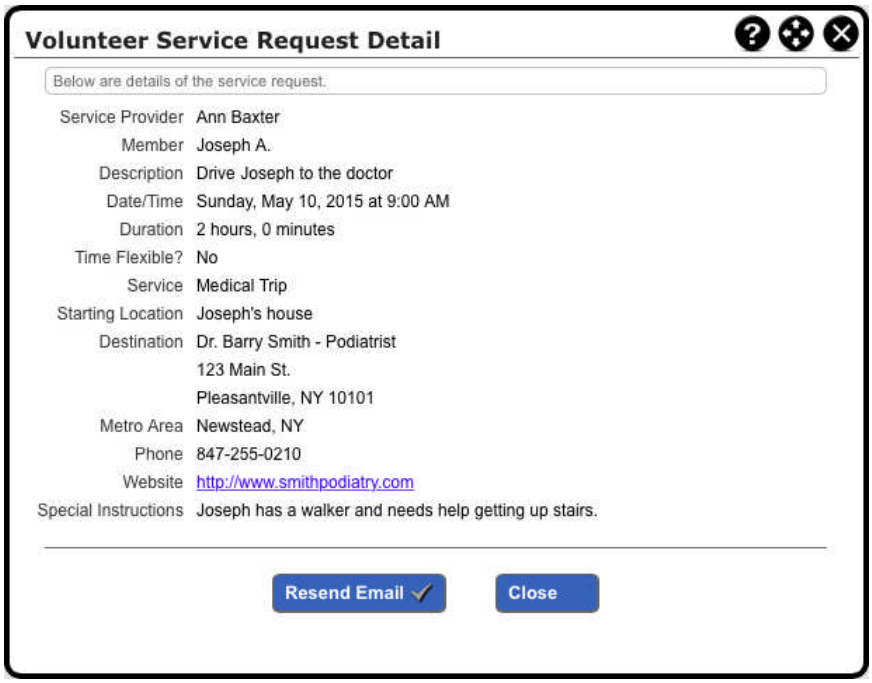
Volunteer Service Request Detail
Below are details of the service request.
Service Provider Ann Baxter
Member Joseph A.
Description Drive Joseph to the doctor
Date/Time Sunday, May 10, 2015 at 9:00 AM
Duration 2 hours, 0 minutes
Time Flexible? No
Service Medical Trip
Starting Location Joseph's house
Destination Dr. Barry Smith - Podiatrist
123 Main St.
Pleasantville, NY 10101
Metro Area Newstead, NY
Phone 847-255-0210
Website http://www.smithpodiatry.com
Special Instructions Joseph has a walker and needs help getting up stairs.
Resend Email
Close

*Figure 7.2 – Volunteer Service Request Detail*

Volunteers accessing this screen will see their own name in the Service Provider field. Clicking the **Confirm** button self-selects them to handle this service request, while clicking the **Cancel** button closes the dialog without selecting this service request.

On the main screen, click the **Search** icon on the Page Tools Widget to search within the list, which could be quite long. The following popup window will appear:

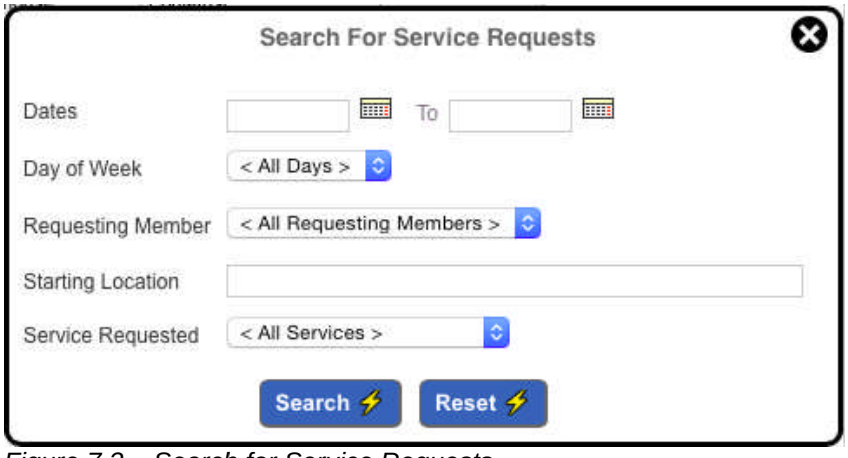


*Figure 7.3 – Search for Service Requests*

Volunteers can search by date range, day of the week, requesting member, starting location (the metro area for hub-and-spoke villages) and the service requested. Searches with multiple criteria are treated as AND conditions (all specified conditions must be matched for a request to be displayed.) For admins, an additional option allows you to search based on Volunteer name.

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Note that this screen displays service requests for all kinds of services and time slots, not just the one(s) for which volunteers have registered. To put it another way, volunteers who said that they are only available on Tuesdays for Medical trips will see all kinds of service requests on all days of the week. This was done to encourage volunteers to volunteer outside their normal comfort area or in case they have additional time outside their normal availability times.

## Past Requests

The Past Requests tab shows volunteers every service request they have handled previously, not just the ones that were self-signed.

Clicking the **View/Edit** icon for a past request displays the following screen:

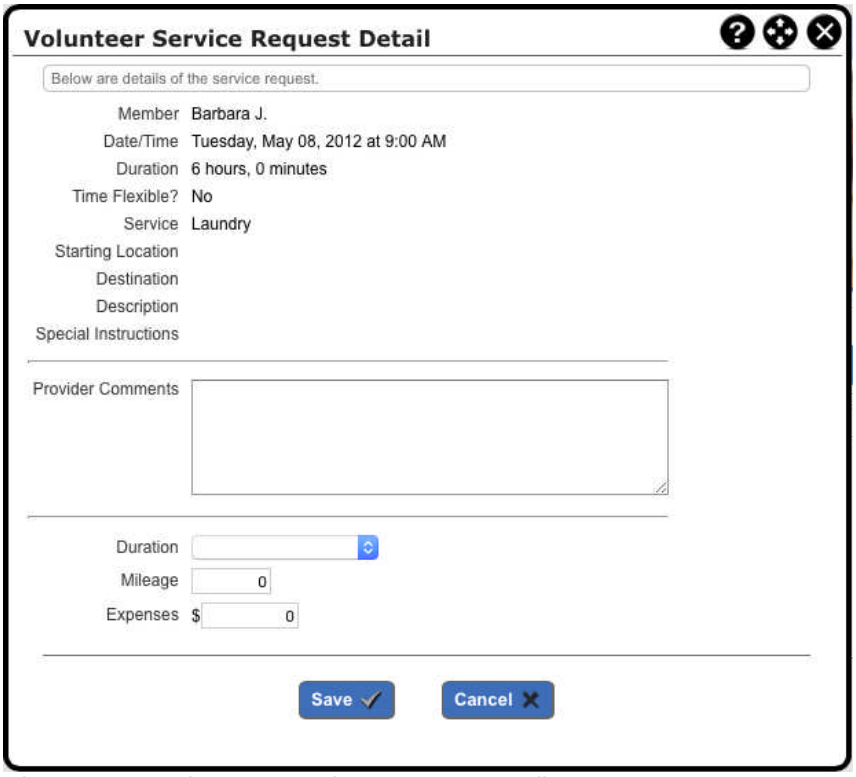


*Figure 7.4 – Volunteer Service Request Detail*

In addition to the basic service request information, this screen allows volunteers to write notes about the request or member and to enter actual duration, mileage, and expenses.

## Committed Requests

The Committed Requests tab shows volunteers all upcoming service requests for which they have committed, not just the ones that were self-signed. (This third tab is especially useful for volunteers to check possible conflicts.) Volunteers can click the **View** icon to view the details of an upcoming request and have the system resend their confirmation email.

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Note that the member's name on this screen is a link that pops up the member's contact information.

### Logging Out

When non-member volunteers have finished reviewing requests, they will click the **Volunteer Logout** button at the bottom of the screen. Note that this special login does not grant non-member volunteers access to any other member features.

## *FOR MEMBER VOLUNTEERS*

When Member Volunteers who are fully vetted login and go to their Profile screen, they will see an additional option:

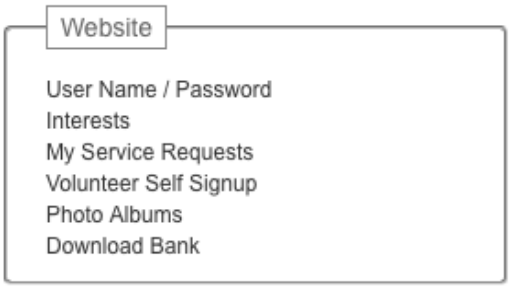


*Figure 7.5 – Volunteer Self Signup option*

When they select **Volunteer Self-Signup**, they will see the same screen described above, allowing them to view and register for open service requests and to view past and committed requests.

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## *FOR ADMINS*

Administrators and Service Request Coordinators will see the **Volunteer Self Signup** option in on the main Services and Service Requests screen. Clicking it displays the same screen described above, showing all open service requests and the search panel to filter the list.

When admins click the **View/Select** icon, their version of the Service Request Detail dialog includes the ability to assign that service request to a specific member or non-member volunteer from among the fully vetted volunteers who provide this service.

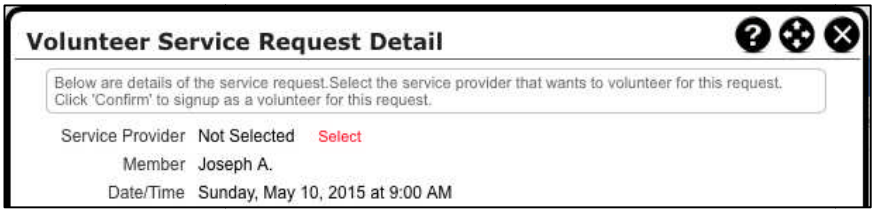
Volunteer Service Request Detail
Below are details of the service request.Select the service provider that wants to volunteer for this request.
Click 'Confirm' to signup as a volunteer for this request.
Service Provider Not Selected Select
Member Joseph A.
Date/Time Sunday, May 10, 2015 at 9:00 AM

*Figure 7.6 – Select a Volunteer for this Service Request*

### VSS Signup Log

Every time a volunteer signs up (or is signed up by an admin) for a service request, an entry is made in a new VSS signup log. It contains the following information:

- Date/Time of Service Request
- Date/Time of Service Request Creation
- Volunteer Name
- User who assigned the volunteer to the Service Request (blank if the volunteer signed themselves up)
- Member Name
- Service Title
- Start Location
- Destination

The Services and Service Requests Export screen allows admins to export this data to a CSV file.

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# Chapter 8 – Become a Service Provider

## *INTRODUCTION*

This module is placed on the public side of your website. It allows non-member volunteers and contractors to register to provide services to village members.

Once the two-page form is completed, people and companies that sign up through this form are added to your non-member database with a status of “Not Fully Vetted”. An email is sent to a designated staff member to let you know that someone has signed up using the form. This tells you to begin the vetting process, including whatever interviews, references, and background checks need to be performed.

## *CONFIGURING THE MODULE*

**Become a Service Provider** can be found on the Control Panel – Village tab – Admin Functions section. Click the **Edit** (pencil) icon to see the following screen:

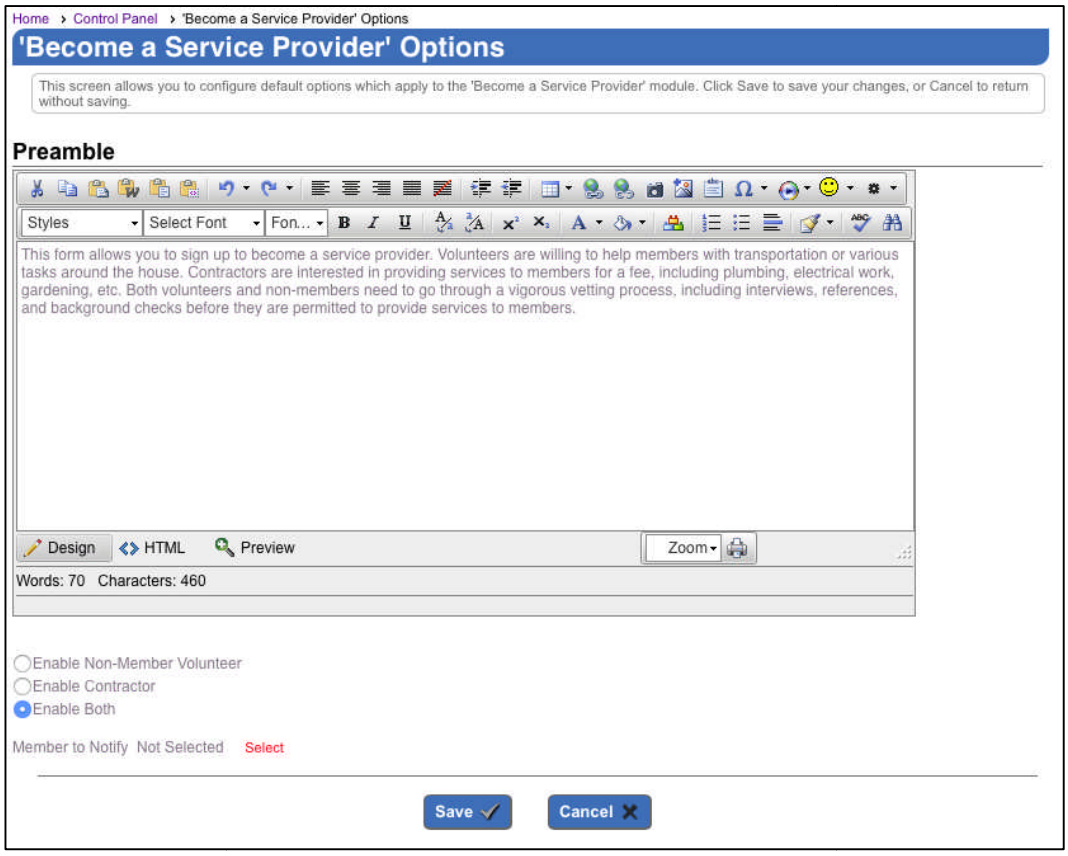
Home › Control Panel › 'Become a Service Provider' Options
'Become a Service Provider' Options
This screen allows you to configure default options which apply to the 'Become a Service Provider' module. Click Save to save your changes, or Cancel to return without saving.
Preamble
Styles
Select Font
Fon...
This form allows you to sign up to become a service provider. Volunteers are willing to help members with transportation or various tasks around the house. Contractors are interested in providing services to members for a fee, including plumbing, electrical work, gardening, etc. Both volunteers and non-members need to go through a vigorous vetting process, including interviews, references, and background checks before they are permitted to provide services to members.
Design
HTML
Preview
Zoom
Words: 70 Characters: 460
Enable Non-Member Volunteer
Enable Contractor
Enable Both
Member to Notify Not Selected Select
Save
Cancel

*Figure 8.1 – Become a Service Provider – Options*

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The editor panel allows you to define preamble text that will be displayed at the top of the module. Use this section to explain to potential volunteers and contractors how the vetting process works.

You can enable this module for non-member volunteers only, for contractors only, or both.

You can also specify a staff member or administrator who will be notified whenever someone completes the form. Click **Save** to save your changes and return to the Control Panel, or **Cancel** to return without saving.

Once you are done, the module can be added to the public menu. (It makes no sense to add it to the members' menu, since this feature is specifically for non-members and contractors.) It can also be linked to a button placed on the home page or a custom page.

## *IN OPERATION*

When someone clicks the link, they will see a screen similar to the following:

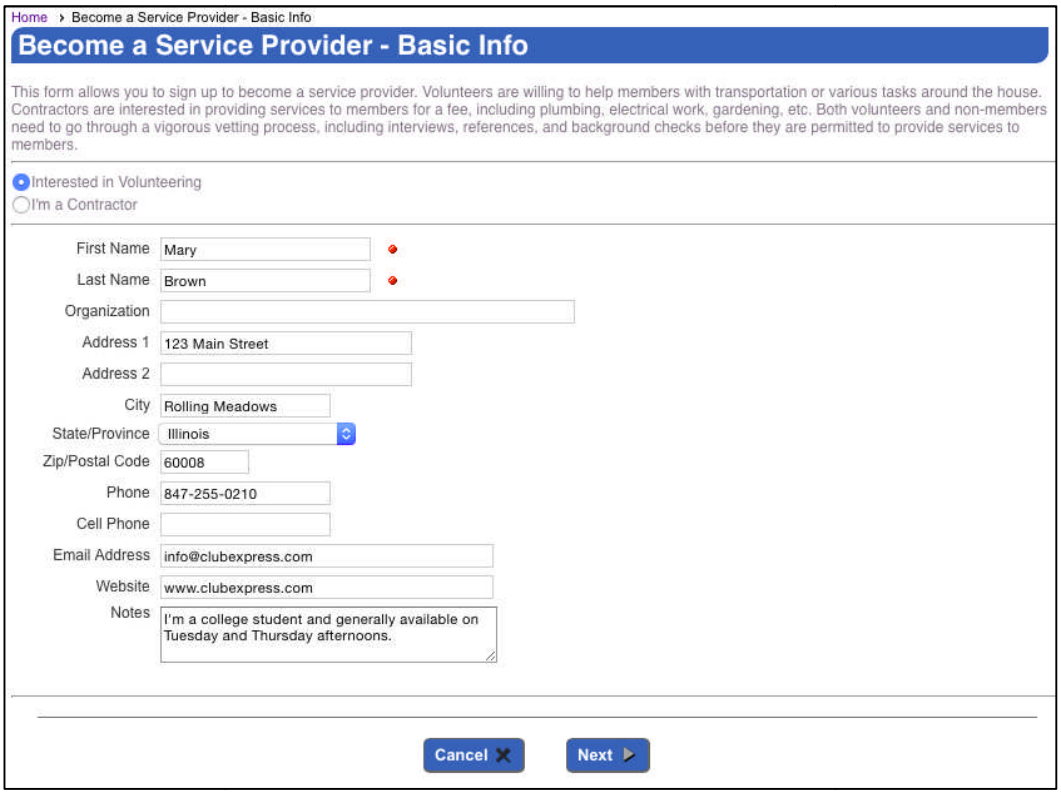
Home › Become a Service Provider - Basic Info
Become a Service Provider - Basic Info
This form allows you to sign up to become a service provider. Volunteers are willing to help members with transportation or various tasks around the house. Contractors are interested in providing services to members for a fee, including plumbing, electrical work, gardening, etc. Both volunteers and non-members need to go through a vigorous vetting process, including interviews, references, and background checks before they are permitted to provide services to members.
Interested in Volunteering
I'm a Contractor
First Name
Mary
Last Name
Brown
Organization
Address 1
123 Main Street
Address 2
City
Rolling Meadows
State/Province
Illinois
Zip/Postal Code
60008
Phone
847-255-0210
Cell Phone
Email Address
info@clubexpress.com
Website
www.clubexpress.com
Notes
I'm a college student and generally available on Tuesday and Thursday afternoons.
Cancel
Next

*Figure 8.2 – Become a Service Provider – Basic Info*

Users will see your preamble text at the top. If this option is enabled for both volunteers and contractors, they need to select one option and then add their basic contact information.

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Clicking **Next** takes them to the second wizard screen, similar to the following:

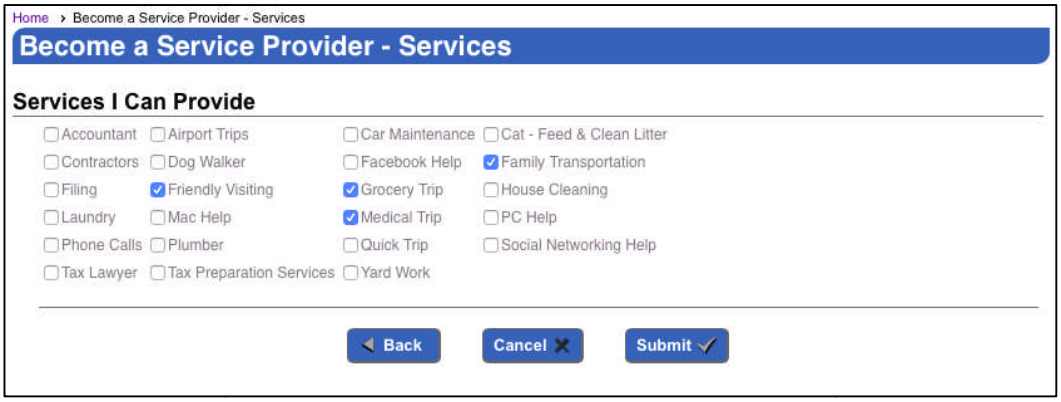


*Figure 8.3 – Become a Service Provider – Services*

This screen lists the services provided by the village. Volunteers and contractors can check off one or more services that they are willing or qualified to provide to village members.

Clicking **Submit** enters this information in the database; clicking **Cancel** cancels the operation and returns the user to the home page.

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